UNLOCKING THE POTENTIAL OF CHARLOTTE'S FOOD SYSTEM AND FARMERS' MARKETS

July 2018

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PREPARED FOR
The City of Charlotte

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PROJECT TEAM

KarenKarp&Partners

Founded as Karp Resources in 1990, Karen Karp & Partners (KK&P) is the nation's leading problem-solver for food-related enterprises, programs, and policies. Our personalized approach is designed to meet the unique challenges facing our clients. We apply a combination of analytic, strategic, and tactical approaches to every problem and deliver solutions that can be measured and are always meaningful.

Our *Good Food is Good Business* division supports the healthy development, execution, and operations of food businesses and initiatives in the public and private sectors. Our services include strategic sourcing, feasibility analysis, market research, business planning, project management, and evaluation. Our *Good People are Good Business* division builds leadership and organizational effectiveness in the food sector through talent and performance management, organizational assessment, capacity building, executive coaching, recruiting, and employee engagement services.

KK&P's clients include corporations, government agencies, small businesses, non-profits, and educational organizations. For almost 30 years, KK&P has spearheaded and has been integral to the development and execution of food businesses, policies, and partnerships.

Market Ventures Inc.

Market Ventures, Inc. is an award-winning specialty urban planning and economic development firm that assists public, non-profit, and for-profit clients with planning, creating, and managing innovative food-based projects and programs. We have particular expertise in public markets and farmers' markets, where we blend cutting-edge business practices with a thorough understanding of and appreciation for the unique challenges facing local farmers and small businesses.

Founded in 1996, Market Ventures stands apart from other firms because we are both experienced consultants and hands-on developers and operators. As consultants, we produce accurate, independent analyses and recommendations tailored to meet the individual needs and circumstances of our clients. Our extensive national experience provides a wealth of information about what works and what does not. We pride ourselves in creating the highest quality reports and presentations based on solid quantitative and qualitative research to help our clients make the best decisions.

Charlotte-Mecklenburg Food Policy Council

The Charlotte-Mecklenburg Food Policy Council exists to advocate for policies that build a sustainable, equitable and healthy local food system. The goals of the council are to enhance the health of our citizens, strengthen local economies and market opportunities, and reduce hunger and food insecurity. To achieve these goals, the Charlotte-Mecklenburg Food Policy Council connects local and state organizations involved in food systems work and educates community members about the importance of healthy, fair, and sustainable local food.

FARMS

F.A.R.M.S. is a nonprofit based in Rock Hill, SC that exist to protect farmers from predatory abuse while relieving hunger in the farmers community. F.A.R.M.S. works in multiple states helping aging farmers with land protection efforts and donating produce from our farmers to hunger relief agencies in their communities. Over the past five year we have donated over 250,000 lbs. of produce and help various farmers with estate planning matters, Jillian Hishaw, Esq., is F.A.R.M.S.,Founder and Director who has over 12 years of experience in the area of agricultural law and environmental policy.

suede onion
CONNECT · GROW · INSPIRE

Suede Onion provides the innovative solutions that food entrepreneurs and small food-based businesses need to expand and improve access to healthy, delicious and responsibly sourced food in Charlotte. Their goal is to provide infrastructure and support for the food innovators of the future here in the Southeast. There is a new generation of farmers, food enthusiasts and entrepreneurs poised to create sustainable change. We proudly support that vision.

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ACKNOWLEDGMENTS

The project team would like to extend their thanks to the many stakeholders who have participated in this project, all of whom are listed in the appendix of this report, as well as all who attended the public meeting in January.

We would also like to thank the organizations who hosted our January meetings: Lomax Incubator Farm, Mary Roberts/Windcrest Organics, Novant Health, and Warehouse 242.

Finally, we would like to thank the City of Charlotte and all members of the Farmers' Market Task Force for initiating and supporting the research and development of this plan.

INTRODUCTION

PROJECT BACKGROUND

This report is the culmination of nearly three years of food system research and engagement initiated by the City of Charlotte. The project is a response to perceptions that Charlotte's regional food system, and in particular its farmers' markets, do not meet their potential in terms of providing strong livelihoods for farmers, advancing more equitable food access, and enhancing vibrant placemaking in the city's communities.

After forming an internal farmers' market analysis team in 2015 and conducting preliminary market research, the city hired local food systems consultancy Suede Onion to facilitate a food system stakeholder meeting in late 2016. This meeting took an inventory of the regional food system's gaps, assets, challenges, and opportunities, as perceived by representatives of sectors across the food system. The primary outcome of this stakeholder engagement was an RFP for an in-depth study of the region's food system and farmers' market landscape, with informed recommendations for systemic improvements as a central objective.

After issuing the RFP in early 2017, the City of Charlotte selected a team led by Karen Karp & Partners (KK&P) in close partnership with Market Ventures, Inc., and with local collaborators the Charlotte-Mecklenburg Food Policy Council (CMFPC), F.A.R.M.S., and Suede Onion. The primary team members were Ben Kerrick of KK&P, Ted Spitzer of Market Ventures, Inc., Erin Brighton of CMFPC, Jillian Hishaw of F.A.R.M.S., and Lynn Caldwell of Suede Onion.

The KK&P consultant team initiated their work in September 2017, and completed their research by March 2018.

METHODOLOGY

The RFP defined four primary research topics:

1. The current state of farming in the region
2. The farmers' market landscape of Charlotte
3. Wholesale activity in the regional food economy
4. Food access and food security

In addition to primary research on these topics, the RFP also requested benchmarking research to provide context for how Charlotte's food system compares to that of peer cities and to add justification for the scale and approach of recommended models. Lastly, the RFP requested community engagement across the course of the project to allow for robust input from key constituent groups.

The KK&P team's work plan was designed around two research visits to Charlotte. The first, in October 2017, included a client kick-off meeting, site visits to a number of farmers' markets and potential market sites, and several in-person interviews. The second visit, in January 2018, included interim presentations to the client team and city leadership, focus groups with market managers and farmers, and an open community meeting. A third visit is planned for the final presentation of this report.

Research was conducted through a number of methods:

Interviews

Interviews were conducted with over 40 stakeholders, including farmers, market managers, wholesale distributors, food access organization leaders, and food sector experts. Interviews were conducted in person when possible, though many interviews were conducted by phone. Interviews were guided by a set of interview questions developed by the consultant team. A list of potential interviewees was provided by the client and expanded by the KK&P team, with significant input from the local team members. Interviewees were selected to provide a range of stakeholder perspectives across the food system.

Site visits

The KK&P team made site visits to as many active farmers' markets as possible, as well as to other sites of interest. Site visits were sometimes paired with formal interviews; in other cases, the consultant team documented the visit, engaged in casual interaction with market vendors and visitors, and recorded general impressions.

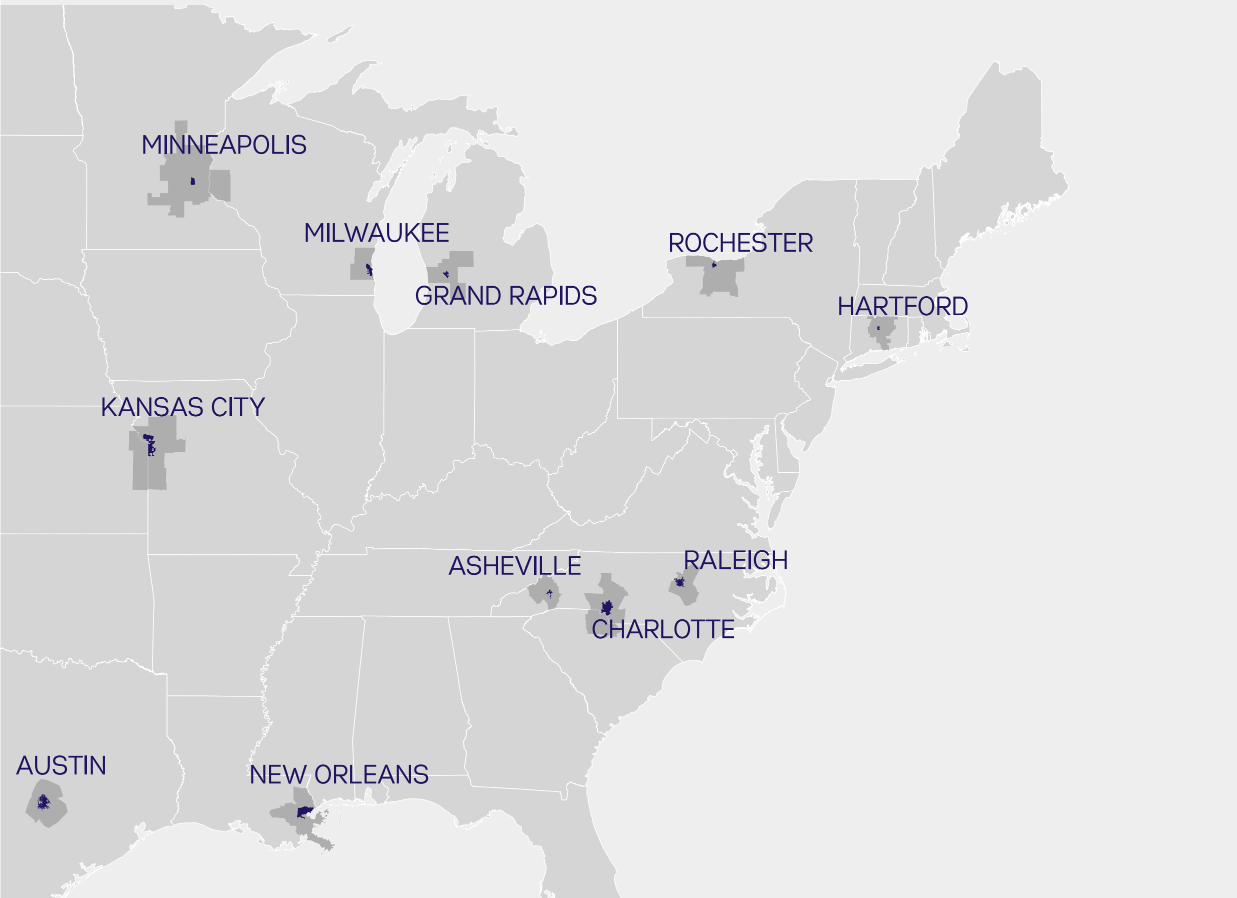
Literature review

In advance of the project kick-off and throughout the span of the research phase, the KK&P team reviewed and consulted existing research and relevant current news articles. Key among these sources were the Charlotte-Mecklenburg Food Policy Council's State of the Plate report (2015) and the Connect Our Future Food Systems Assessment and Action Plan (2014). Themes and findings from these and other reports laid a foundation for the KK&P team's research.

Focus groups and community meeting

During the KK&P team's January visit, they facilitated three focus groups and one open community meeting. During these gatherings, the team presented preliminary research findings and sought feedback on a broad range of potential strategies. The feedback

SELECTED BENCHMARK COMMUNITIES (CITY AND MSA BOUNDARIES)



received during these meetings shaped the final recommendations that are detailed in this report.

Model research

To support and rationalize the recommendations provided in this report, KK&P and Market Ventures researched relevant model initiatives from elsewhere in the U.S. When possible, this research included budgetary considerations such as development cost and annual operating budget.

Secondary data review and analysis

In addition to primary research conducted through interviews and focus groups, KK&P completed extensive review and analysis of secondary data, including the USDA Census of Agriculture and the American Community Survey. This data forms the basis of the quantitative components of the regional food system research and benchmarking research.

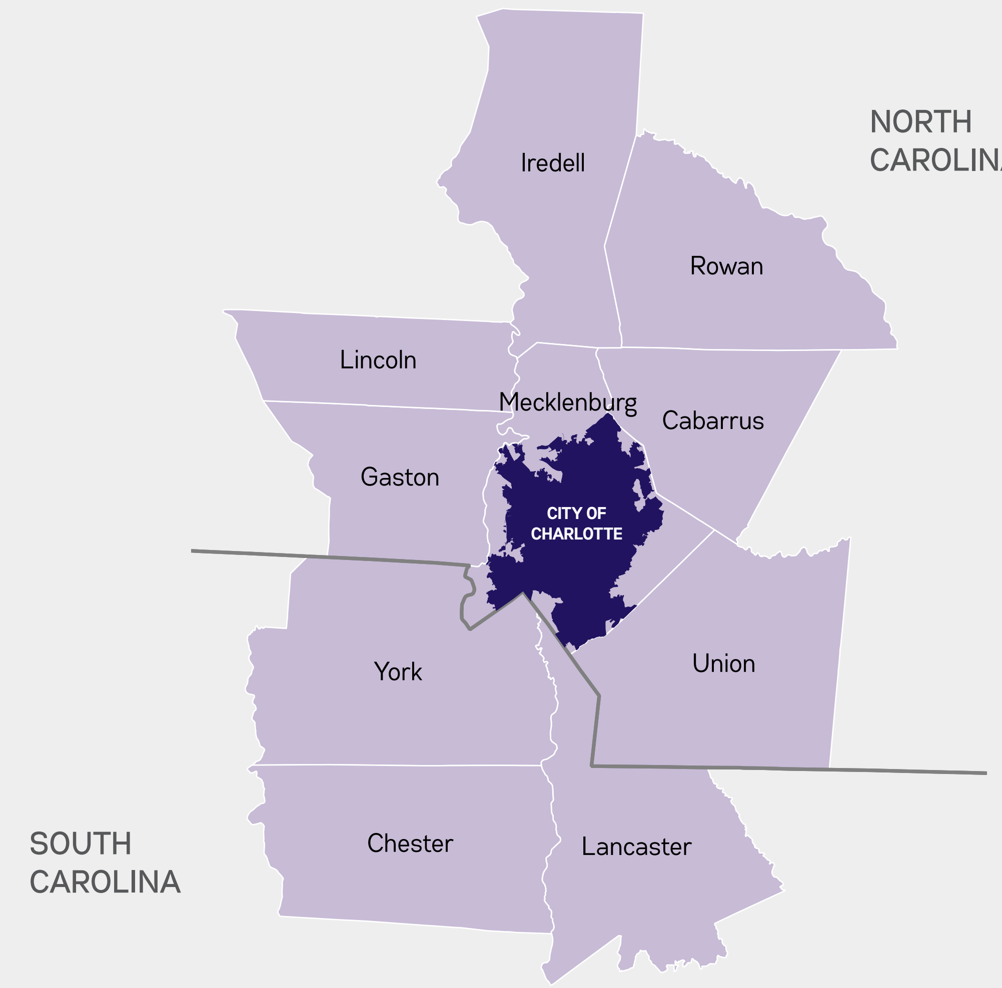
Benchmarking

The KK&P team selected ten cities as a benchmarking cohort for Charlotte. These cities were selected qualitatively, primarily on the basis of having successful initiatives that are relevant to the dynamics of Charlotte's food system. For each indicator, comparisons were made at up to three geographic levels, depending on data availability: city, core county (county where benchmark city is primarily located), and multi-county metropolitan statistical area (MSA). Complete findings from the benchmarking research are included as an appendix to this report; highlights are integrated into the summary of food system research. Benchmark communities are shown on the U.S. map at left.

A note on defining the region

Regional food systems never have hard geographic boundaries; how one defines a city's 'foodshed,' or geographic area from which its local food supply comes (think 'watershed'), is necessarily subjective and imprecise. For the purposes of this project, the Charlotte region is defined as its 10-county metropolitan statistical area (MSA), as specified by the U.S. Census Bureau. This definition allowed for consistent comparisons with benchmark MSAs. Furthermore, about two-thirds of the Charlotte Regional Farmers Market's vendors come from within the 10-county region, indicating that a significant majority of Charlotte's regional food supply comes from within this area. Throughout this report, "the Charlotte region" or "the region" refers to this 10-county MSA unless otherwise noted.

10-COUNTY PROJECT REGION: THE CHARLOTTE MSA



CHARLOTTE'S REGIONAL FOOD SYSTEM

INTRODUCTION

With a long growing season, over 900,000 farmed acres in its 10-county region, and nearly 850,000 eaters within its city boundaries, Charlotte has the ingredients of a strong regional food economy.

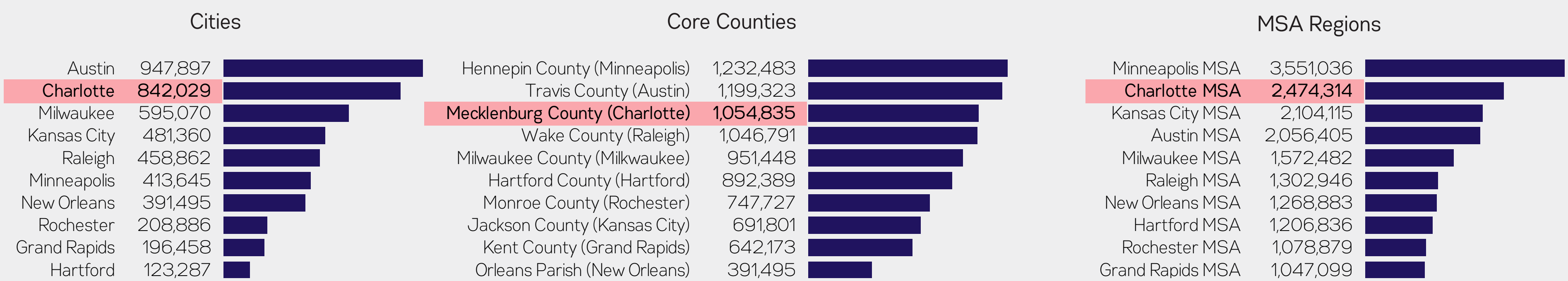
Farmers' markets have proliferated, while increasing numbers of restaurants and retailers promote their sourcing from local farms. At the same time, there is a widespread perception that the city is not fully tapping the potential of its local food system. While farmers' markets have popped up, they lack a network for coordination and collaboration and do not sufficiently serve high-need areas. The Charlotte Regional Farmers Market underperforms compared to peer markets in the state, despite Charlotte having a greater population than the other state markets' home cities. Wholesale distributors that source North Carolina-grown products and sell into the Charlotte market do not source from the Charlotte region in significant volumes.

The section sheds light on the dynamics of the region's food economy by summarizing the key findings from a multi-pronged research effort that included the following methods:

- Interviews with over 40 stakeholders
- Site visits to many of Mecklenburg County's farmers' markets and many other sites of interest
- Focus groups including over 30 participants
- An open community meeting with over 100 attendees
- Review and analysis of secondary data from the USDA, American Community Survey, and other sources
- Benchmarking against peer cities

For the benchmarking portion of our research, we identified ten cities with some relevance to Charlotte. Most of these cities were selected because they have successful initiatives that respond to conditions similar to Charlotte's. Data for a number of indicators were compiled to benchmark Charlotte's regional food economy against these cities. Benchmarking comparisons were made at three geographic levels: city, core county (county where city is primarily located), and multi-county MSA. Key findings from the benchmarking research are included in this section, and the complete benchmarking report is included as an appendix to this document.

POPULATIONS OF BENCHMARK COMMUNITIES



KEY FINDINGS

The findings summarized in this section are synthesized from our research efforts and are organized according to the four key topics specified in the project RFP: farming and food production in the region, the farmers' market landscape, wholesale activity, and food access and food security.

"Farming in the Carolinas is great. We have great soil and we can grow all year round."

- Farmer

The farm and food economy of the Charlotte Region

REGIONAL ASSETS

The 10-county Charlotte MSA region is generally well-suited to agricultural production. It has a long growing season and good soils, though as a Cabarrus County food system assessment notes, "access to sufficient water and irrigation is and will continue to be a challenge." Soils tend to be clay-heavy, which one farmer described as both an asset and a challenge.

Access to the major urban market of Charlotte is an important asset for the region's farmers, who note that they are able to fetch higher prices on their products in Charlotte than in the smaller rural towns around the city.

FARMS, ACREAGE AND SALES

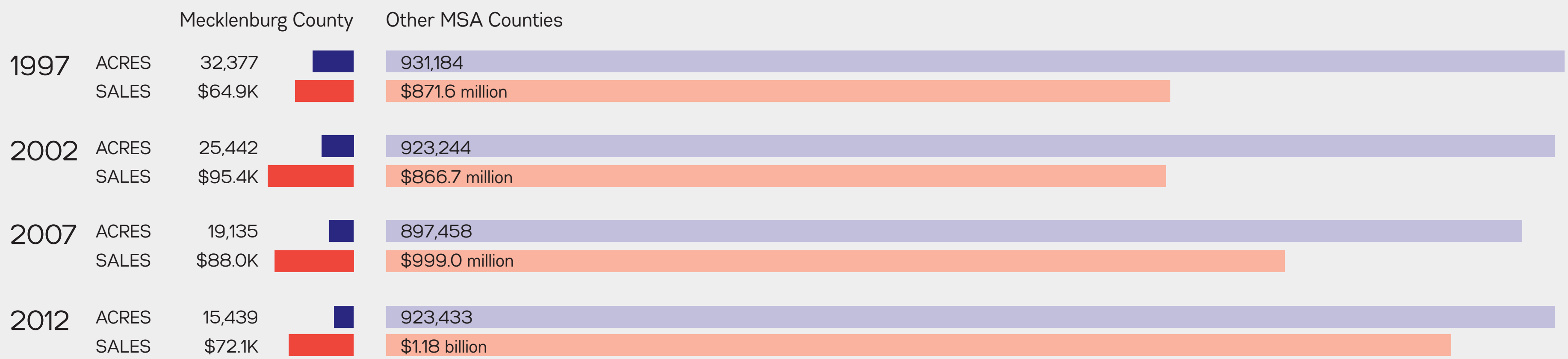
According to the 2012 USDA Census of Agriculture, there were 7,328 farms in the 10-county region, occupying 938,872 acres of farmland – about 29% of the region's total land area[1]. Farmland acreage held relatively steady from 1997 to 2012, losing just 2.6% of its acreage during that period – about 25,000 acres. The region's farmers earned total sales in excess of $1.2 billion in 2012, representing a 34% increase over 1997 (in inflation-adjusted dollars)[2].

Mecklenburg County has seen more dramatic shifts in its agricultural land use from 1997-2012, due to its increasing urbanization. During that 15-year period, it lost over a third of its farms (from 377 farms in 1997

1 / The USDA Census of Agriculture relies on self-reporting by farmers and, as a result, suffers from limited participation and perhaps some instances of underreporting, particularly among small growers. Despite these limitations, the census often provides the best available data.

2 / This increased productivity concurrent with farmland losses is consistent with national trends.

FARM ACREAGE AND SALES 1997-2012, MECKLENBURG COUNTY AND CHARLOTTE MSA (2016 adjusted dollars)



FARMS, FARM ACREAGE, & AGRICULTURAL SALES IN BENCHMARK COMMUNITIES (2012)

Number of Farms

Kent County (Grand Rapids)	1,159
Travis County (Austin)	1,132
Buncombe County (Asheville)	1,060
Hartford County (Hartford)	899
Wake County (Raleigh)	783
Jackson County (Kansas City)	701
Hennepin County (Minneapolis)	627
Monroe County (Rochester)	475
Mecklenburg County (Charlotte)	237
Milwaukee County (Milkwaukee)	82
Orleans Parish (New Orleans)	14

Minneapolis MSA	13,251
Kansas City MSA	12,757
Austin MSA	8,819
Charlotte MSA	7,328
Grand Rapids MSA	4,680
Rochester MSA	4,268
Asheville MSA	2,844
Raleigh MSA	2,500
Hartford MSA	1,995
Milwaukee MSA	1,767
New Orleans MSA	1,027

Farm Acreage and Percent of All Land in Farms

Travis County (Austin)	39.9%	252,686
Kent County (Grand Rapids)	29.0%	157,493
Jackson County (Kansas City)	28.7%	110,891
Monroe County (Rochester)	23.5%	98,676
Wake County (Raleigh)	15.8%	84,229
Buncombe County (Asheville)	17.0%	71,480
Hennepin County (Minneapolis)	19.4%	68,856
Hartford County (Hartford)	11.5%	54,062
Mecklenburg County (Charlotte)	4.6%	15,439
Milwaukee County (Milkwaukee)	3.0%	4,563
Orleans Parish (New Orleans)	0.1%	111

Kansas City MSA	67.3%	3,124,397
Minneapolis MSA	53.2%	2,598,013
Austin MSA	65.0%	1,754,333
Charlotte MSA	29.0%	938,872
Rochester MSA	44.4%	927,382
Grand Rapids MSA	43.7%	746,084
Raleigh MSA	29.2%	395,945
Milwaukee MSA	31.7%	295,193
New Orleans MSA	11.2%	229,706
Asheville MSA	16.3%	212,489
Hartford MSA	13.0%	125,896

Agricultural Sales

Kent County (Grand Rapids)	$231,861,000
Hartford County (Hartford)	$113,896,000
Monroe County (Rochester)	$90,580,000
Mecklenburg County (Charlotte)*	$68,996,000
Wake County (Raleigh)	$65,243,000
Hennepin County (Minneapolis)	$64,469,000
Buncombe County (Asheville)	$54,413,000
Travis County (Austin)	$41,668,000
Jackson County (Kansas City)	$32,532,000
Milwaukee County (Milkwaukee)	$7,616,000
Orleans Parish (New Orleans)	$520,000

Minneapolis MSA	$2,169,822,000
Charlotte MSA	$1,201,565,872
Grand Rapids MSA	$1,120,277,000
Rochester MSA	$930,665,000
Kansas City MSA	$785,686,000
Raleigh MSA	$411,889,000
Austin MSA	$284,542,000
Milwaukee MSA	$250,058,000
Hartford MSA	$222,355,000
Asheville MSA	$136,031,000
New Orleans MSA	$77,831,000

to 237 farms in 2012), and over half its farm acreage. In 2012, the county accounted for just 1.6% of the 10-county region's farmland. Despite these losses, Mecklenburg County's total agricultural sales are likely to have increased by about 11% during this period[3].

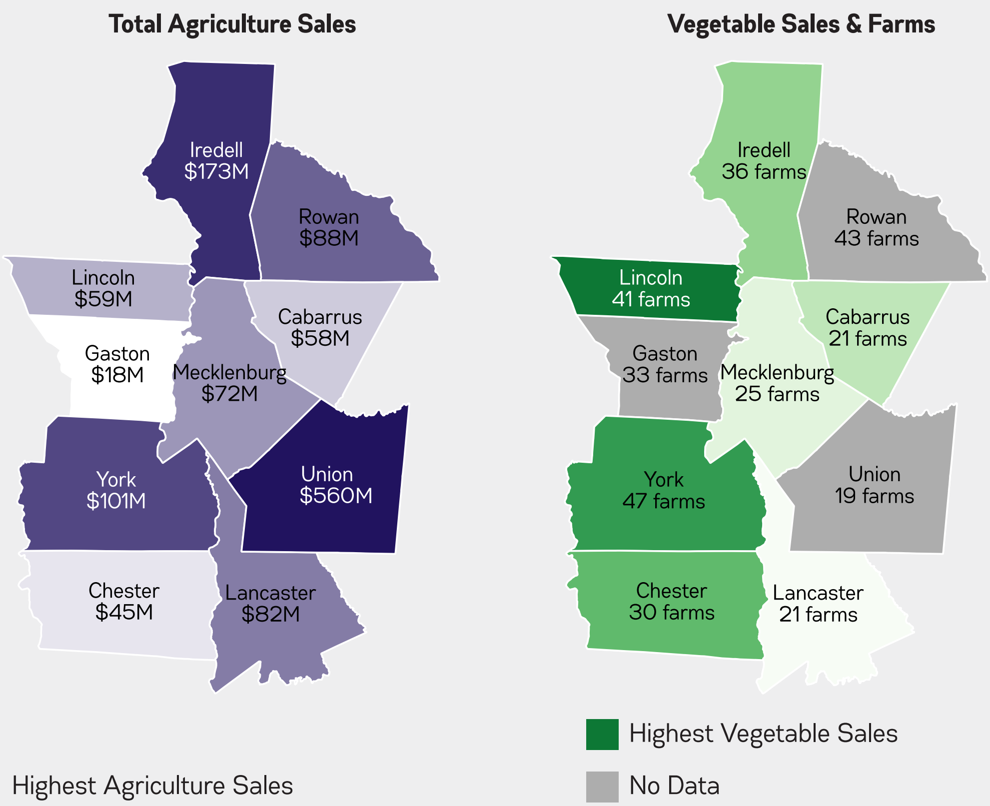
The Charlotte MSA ranks fourth out of its 11-city benchmarking cohort for both number of farms and land in farms, while Mecklenburg County ranks near the bottom compared to other core counties for both of those indicators. This suggests that Mecklenburg County is more highly urbanized than other core counties, but that the larger MSA has farmland acreage comparable to other regions in the benchmarking cohort. The Charlotte MSA had the second highest agriculture sales out of its benchmarking cohort, driven largely by poultry and egg production, as discussed below.

Within the Charlotte MSA, Union County had the highest 2012 agriculture sales by far, with about $536 million (or $560 million in 2016-adjusted dollars) – nearly half of the region's total. Union County's sales are largely driven by poultry and eggs, which alone account for 74% of the county's sales. Iredell and York counties follow Union in sales, with $166 million and $97 million, respectively. Iredell's most important commodity groups are poultry and eggs and milk from cows, while York's most important is poultry and eggs.

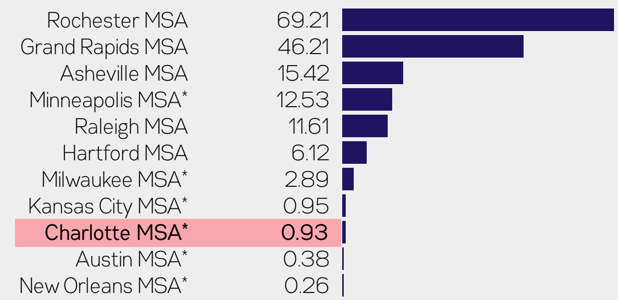
Although local and regional food systems are not limited to fruit and vegetable supply (meat, poultry,

3 / Mecklenburg County total agricultural sales figures were not released for 2007 and 2012, due to confidentiality protocols; for the purposes of this report, sales for those years were estimated using a methodology detailed in the appendix. The USDA uses data suppression to protect the confidentiality of farmers, when a small number of farms dominate a particular data point. Agricultural sales data for Mecklenburg County was suppressed in this way.

TOTAL AGRICULTURE SALES AND SALES FROM VEGETABLES IN THE CHARLOTTE REGION (2012)



FRUIT AND VEGETABLE ACREAGE PER 1000 RESIDENTS IN BENCHMARK COMMUNITIES



* denotes figure that is based on incomplete data (i.e. some counties had data withheld for confidentiality). All counties with data withheld are treated as '0' value; thus, all figures for asterisked geographies represent a minimum, and the actual value is likely to be somewhat higher.

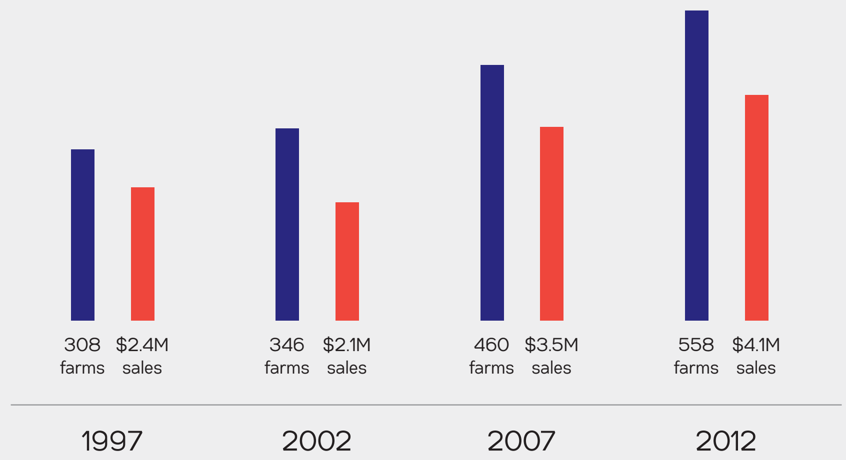
eggs, dairy, etc. all contribute importantly to regional food supply), fruits and vegetables are usually the leading products in re-localizing food supply chains, and understanding their production dynamics is thus relevant to this study. Total vegetable sales for the 10-county region amounted to $3.9 million[4] in 2012. Lincoln, York, and Chester counties had the highest sales; however, Rowan County, which had sales data suppressed, significantly leads in vegetable acreage and is likely to lead in sales. The region's fruit and tree nut sales amount to $3.94 million[5], with Rowan and York counties leading. Thus, although data suppressions make it difficult to form a complete picture, it seems apparent that Rowan, York, Lincoln, and to a lesser extent, Chester, are the region's most important counties for vegetable and fruit production.

The Charlotte MSA ranks quite low for fruit and vegetable production among its benchmark regions. It is ranked 9th (out of 11) for vegetable sales, 8th for fruit and tree nut sales, and 9th for vegetable and fruit acreage per 1,000 residents. This last indicator is particularly striking, as the Charlotte region has just 0.93 acres of fruit or vegetable production per 1,000 residents – compared to, for example, Raleigh, the 5th-ranked MSA, which has nearly 12 acres per 1,000 residents. This suggests that the Charlotte region has a fairly low level of production of crop types likely to be sold through direct and local markets. Although certainly not all fruits and vegetables are sold exclusively to residents in the county or MSA where they are grown, a low ratio of vegetable and fruit acreage to population indicates that current supply is probably insufficient to meet growing demand.

4 / With data suppressed for three counties: Gaston, Rowan, and Union.

5 / With data suppressed for four counties: Cabarrus, Gaston, Iredell, and Lancaster.

CHARLOTTE REGION DIRECT-TO-CONSUMER ACTIVITY 1997-2012: FARMS AND SALES (2016 adjusted dollars)



DIRECT-TO-CONSUMER SALES IN BENCHMARK COMMUNITIES: SALES AND PERCENT OF TOTAL AGRICULTURE SALES

Hartford MSA	5.92%	$13,174,000
Asheville MSA	3.10%	$4,220,000
Milwaukee MSA	1.54%	$3,858,000
New Orleans MSA	1.44%	$1,123,000
Rochester MSA	1.16%	$10,762,000
Grand Rapids MSA	0.75%	$8,378,000
Minneapolis MSA	0.71%	$15,405,000
Austin MSA	0.66%	$1,889,000
Raleigh MSA	0.49%	$2,004,000
Kansas City MSA	0.47%	$3,698,000
Charlotte MSA	0.32%	$3,884,000

DIRECT-TO-CONSUMER SALES IN BENCHMARK COMMUNITIES: SALES PER CAPITA

Hartford MSA	$10.92
Rochester MSA	$9.98
Asheville MSA	$9.33
Grand Rapids MSA	$8.00
Minneapolis MSA	$4.34
Milwaukee MSA	$2.45
Kansas City MSA	$1.76
Charlotte MSA	$1.57
Raleigh MSA	$1.54
Austin MSA	$0.92
New Orleans MSA	$0.89

DIRECT SALES

Direct-to-consumer sales describe transactions where a farmer sells directly to the end consumer, whether at a farmers' market, farm stand, you-pick, or through community-supported agriculture (CSA). Although it does not capture the entirety of the local/regional food system, it is a good indicator of locally produced foods going to the region's residents.

From 1997 to 2012, the 10-county region saw direct-to-consumer sales increase by over 90% in 2016-adjusted dollars, from $2.4 million to $4.1 million. York and Iredell counties led in direct sales by total amount, while Gaston County had the highest proportion of total agriculture sales in direct-to-consumer transactions (1.6%). The number of the region's farms participating in direct sales grew by 81% from 1997 to 2012, but at 558 farms, they still only account for less than 8% of all farms (compared to 8.9% for North Carolina and 6.9% for the U.S. as a whole). By contrast, eight of the ten other benchmark MSA regions have direct sale participation exceeding 11% (see benchmarking detail in appendix). This indicates that Charlotte region farms do not have strong direct sale market channels.

The Charlotte MSA significantly underperforms in direct-to consumer activity compared to its benchmark cohort regions. Direct-to-consumer sales make up just 0.32% of total agriculture sales – the lowest percentage of all benchmark regions. Direct-to-consumer sales per capita are just $1.57, compared to the top four cities, which all have direct sales in excess of $8 per capita.

Within the Charlotte region, Mecklenburg County had the highest proportion of farms participating in direct sales: 16% of its farms participated in direct-to-consumer sales, ranking it at 8th out of the 11 benchmark core counties.

Direct-to-consumer sales in the Charlotte region are just $1.57 per capita, compared to several benchmark cities with direct sales in excess of $8 per capita.

FARMERS OF COLOR AND IMMIGRANT FARMERS

Minority farmers or farmers of color occupy a small but important and quickly growing portion of the region's farmer base. While the number of all farms in the region decreased by 2% from 2007 to 2012, the number of farms with Black/African American operators grew by 50% to 169 farms, the number of farms with Asian operators grew by 45% to 48 farms, and farms with Latino/Hispanic operators increased by 15% to 108 farms. Black or African American farmers in particular face significant disparities in land and farm income when compared to all farms: at the state level in North Carolina, black farmers have smaller farms (95 acres vs. 168 acre average size) and earn less ($73K average sales per farm vs. $251K). Farmers of color may also face discrimination and challenges accessing resources and technical assistance. The USDA has a checkered history of institutionalized discrimination in its provision of resources and support; Tim Pigford, the black farmer who initiated a successful class action civil rights lawsuit against the USDA in 1997, is from North Carolina[6].

Farmers of color occupy an important and quickly growing portion of the region's farmer base.

Farming presents a potential economic entry point for many immigrant groups, but there are significant barriers. One attendee at this project's community meeting provided an illustrative anecdote: the son of immigrants from North Vietnam, he described how his parents were skilled farmers in Vietnam, but in Charlotte, they are stuck working entry-level fast food jobs. They are interested in pursuing farming in the Charlotte area, but they are not aware of resources or training to help them adapt their farming skills to their new home. Catawba County Cooperative Extension Center (located outside of this project's 10-county region, but less than 50 miles from central Charlotte) has an Immigrant Agriculture Program that is tailored to meet the needs of Hmong farmers. The 10-county Charlotte region does not have a comparable program.

6 / www.thenation.com/article/real-story-racism-usda/

FARMERS OF COLOR IN THE CHARLOTTE REGION: 2012 FARMS AND GROWTH 2007-2012

Farms with Black or African American operators

169 farms — *50% growth 2007-2012*

Farms with Hispanic or Latino operators

108 farms — *15% growth 2007-2012*

Farms with Asian operators

48 farms — *45% growth 2007-2012*

Farmers of diverse backgrounds are a critical component of a food system that meets the varied cultural needs of a polyglot urban population base. The Rosa Parks Farmers Market, for example, has made it a priority to identify black farmers to participate as vendors, as the market is located in a predominantly African American neighborhood. Although there are some support services and organizations targeted to farmers of color (including the non-profit F.A.R.M.S., a member of the consultant team, and The Males Place, an agriculture training program for young African American men in low-income neighborhoods), the region lacks a well-developed, well-funded, and coordinated ecosystem of support and resources for farmers of color and immigrant farmers, due at least in part to underfunding and insufficient support for existing organizations.

URBAN AGRICULTURE

Although the USDA does not collect data on urban agriculture, there are numerous initiatives and farm businesses that grow fresh food within the Charlotte city limits. A few examples include Friendship Gardens, which coordinates an urban farm, backyard gardens, and a garden network to support its meals-on-wheels services; the Seeds For Change urban farm, which sells its produce at its new on-site farmers' market; the Males Place Community Garden, which uses community-based agriculture to teach life skills and entrepreneurship to young African American men; the Little Sugar Creek Community Garden, a foodshare garden hosted by the county's Park and Recreation department; and Small City Farm, a 3-acre urban farm that operates a CSA and sells wholesale to restaurants. These examples illustrate a range of urban agriculture activities with diverse objectives, including education, food access, and retail and wholesale business.

The Little Sugar Creek Community Garden is a foodshare garden hosted by the county's Park and Recreation department.

Practitioners of urban agriculture face different challenges from their rural counterparts. Urban zoning codes hinder certain activities that are critical to urban farming (such as the installation of hoop houses or other structures), and the smaller parcel sizes mean smaller scale production. Nevertheless, urban agriculture, because of its proximity to urban dwellers, also offers unique benefits, in terms of both education opportunities and shortened supply chains.

SUPPLY AND DEMAND

Identifying and quantifying a region's demand for local food, and balancing it against current and potential production, is a challenge. Interest in local foods is a deeply cultural phenomenon, and while it has grown dramatically across the U.S. over the past two decades, in many regions it is still growing – and requires education and further cultural shifts to continue its growth.

In 2014, the Connect Our Future study assessed the potential demand for locally grown foods in a 14-county region that includes all ten of the Charlotte MSA counties, plus Cleveland, Stanly, and Anson counties in NC, and Union County in SC. That study estimated that residents of the 14-county region spend about $665 million annually on the fruits and vegetables that could be grown in the region, and that the region's farmers earn about $97 million in sales on those same crops. Thus, the study identified a gap of over $560 million – potential growth in local fruit and vegetable production. Of course, that is not a quantification of actual demand for locally grown foods, and it ignores the spread between the wholesale prices paid to farmers and retail purchases by consumers, but it does provide a simple illustration of the large chasm between consumer demand and what farmers earn in the region, suggesting that there is plenty of room for growth in the local food system.

Study stakeholders generally shared the perspective that Charlotte has untapped potential demand for locally grown food, but that it needs help unlocking that demand – through education, marketing, better visibility, more supply, and a shift in the city's and region's culture of eating. A multifaceted approach to increasing supply and demand incrementally is necessary to grow the local food system in a sustainable way.

Supply and demand in the regional food system must both be nurtured and grow in tandem. Farmland preservation and stronger career pathways for farmers will be critical to increasing the region's food production.

FARMLAND PRESERVATION

As previously described, while the 10-county region lost just 2.6% of its farmland acreage from 1997-2012, Mecklenburg County lost more than half of its farmland. The county is developing rapidly, and one recent report estimates that it will essentially run out of developable land by the year 2030[7]. Mecklenburg County has never had a rural or farmland preservation

7 / www.charlotteagenda.com/98634/charlotte-will-run-real-estate-develop-2030/

policy in place, despite some failed attempts[8]. That may be changing, however, as the Mecklenburg County Soil & Water Conservation District is working with community partners (UNC Charlotte, Charlotte-Mecklenburg Food Policy Council, and Rivendell Farms) to explore the potential for a Voluntary Agricultural District (VAD). Mecklenburg County is one of just 12 counties in NC that have not adopted a VAD, and it is the only major urban county in the state that has not done so[9]. This new momentum, along with the efforts of groups like the Carolina Farm Trust, may successfully preserve some farmland in Mecklenburg County before it is lost to development. At the same time, the need for farmland preservation beyond Mecklenburg County's boundaries should not be overlooked, as farmland in these counties is critical to Charlotte's food supply. The Land Trust for Central North Carolina preserves land in a 10-county region to the north and west of Charlotte, including Iredell, Rowan and Cabarrus counties.

SUPPORT SERVICES FOR FARMERS

Education, resources, training, and access to land and capital are critical to maintain, expand, and support the region's farmer base. While valuable resources do exist – notably, the Carolina Farm Stewardship Association and Lomax Incubator Farm, County Cooperative Extension centers, and Carolina Farm Trust, not to mention the informal knowledge-sharing networks among famers – the Charlotte region lacks a robust, well-coordinated, and well-marketed system of support services for farmers.

8 / For an excellent history of rural preservation efforts in Mecklenburg County, see: plancharlotte.org/story/rural-farmland-preservation-planning-mecklenburg

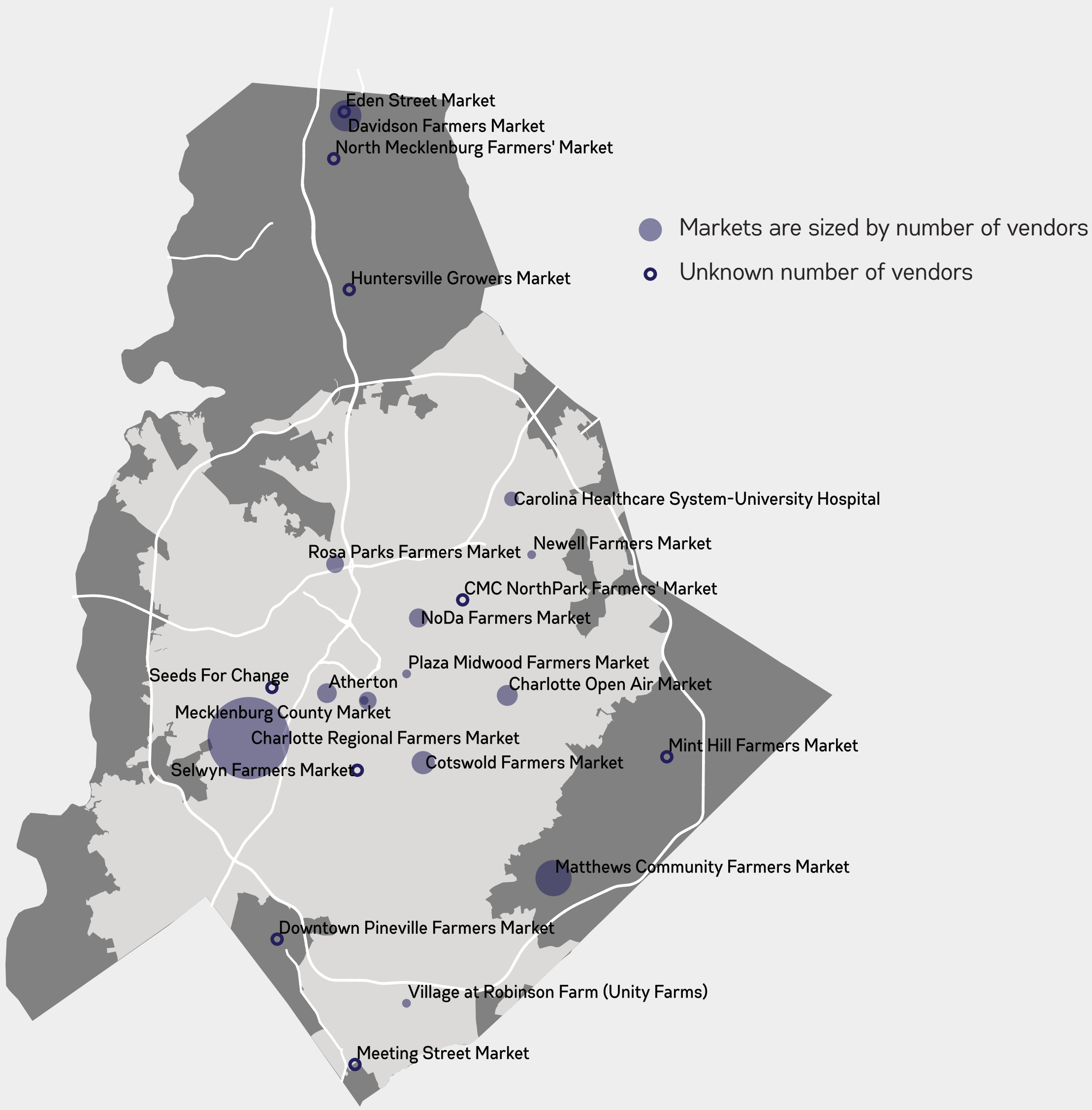
9 / plancharlotte.org/story/voluntary-farmland-preservation-mecklenburg

The Lomax Incubator Farm in Cabarrus County offers training and farm business incubation for beginning farmers.

"You can't just save the land. You've got to save the farmers."

- Charlotte regional issues expert

FARMERS' MARKETS IN CHARLOTTE AND MECKLENBURG COUNTY



The farmers' market landscape in Charlotte

CHARLOTTE'S FARMERS' MARKETS

The landscape of farmers' markets in Charlotte and Mecklenburg County is dynamic – in the span of this study, at least one new farmers' market was launched, while others ceased. Our research indicated 23 active farmers' markets in Mecklenburg County in 2017, 16 of which are in Charlotte. Several other markets exist outside of Mecklenburg County but within the 10-county region.

Within the benchmarking cohort, Charlotte and Mecklenburg County are ranked low – 10th and 9th respectively – in number of USDA-registered farmers' markets per 100,000 residents. The USDA registry of farmers' markets should not be considered comprehensive or completely accurate or current, since, for example, there are several known Charlotte farmers' markets that are not registered with the USDA. Nevertheless, it provides the best dataset for making comparisons among US cities and regions. Charlotte's low numbers here may actually be an indication of relatively low participation in the registry.

Farmers' markets are defined by the USDA as any market with "two or more farmer-producers that sell their own agricultural products directly to the general public at a fixed location, which includes fruits and vegetables, meat, fish, poultry, dairy products, and grains[10]." Thus, some markets that do not self-identify as "farmers' markets," such as the Charlotte Open Air Market, which features a wide array of product types

10 / https://www.fns.usda.gov/ebt/definitions-farmers-markets-direct-marketing-farmers-and-other-related-terms

USDA-REGISTERED FARMERS' MARKETS IN BENCHMARK COMMUNITIES (2018)

Cities

	# of markets	markets per 100K residents
Asheville	11	12.35
Rochester	16	7.66
Minneapolis	29	7.01
Hartford	8	6.49
Grand Rapids	10	5.09
Kansas City	15	3.12
Milwaukee	16	2.69
New Orleans	10	2.55
Raleigh	6	1.31
Charlotte	8	0.95
Austin	9	0.95

Core Counties

	# of markets	markets per 100K residents
Buncombe County (Asheville)	17	6.64
Hartford County (Hartford)	35	3.92
Monroe County (Rochester)	29	3.88
Hennepin County (Minneapolis)	43	3.49
Kent County (Grand Rapids)	20	3.11
Milwaukee County (Milkwaukee)	25	2.63
Jackson County (Kansas City)	18	2.60
Orleans Parish (New Orleans)	10	2.55
Mecklenburg County (Charlotte)	15	1.42
Wake County (Raleigh)	14	1.34
Travis County (Austin)	12	1.00

With about 500,000 annual visitors, the 22-acre Charlotte Regional Farmers Market is the region's largest farmers' market.

and vendors including farmer-producers, are still considered farmers' markets. For the purposes of this study, we avoided strictly defining farmers' markets, and included, for example, the Plaza Midwood Farmers Market, which features a single farmer-producer vendor who aggregates product from multiple farms (including her own), though she is the only vendor present.

Central to the framework and assumptions of this study is the notion that farmers' markets provide a range of benefits to their communities, including marketing opportunities for farmers and food entrepreneurs, access to fresh and healthy food for residents, placemaking, relationship-building among community members, health promotion and education. Market managers we spoke to emphasized these multiple dimensions of positive community impact.

THE CHARLOTTE REGIONAL FARMERS MARKET

Charlotte is home to one of North Carolina's four state-owned and operated farmers' markets. The Charlotte Regional Farmers Market (CRFM) was built in 1985 on 22 acres, and now sees about 500,000 visitors annually – which makes it the largest farmers' market in the region, though it has far fewer visitors than North Carolina's other state-run markets, with annual visitorships ranging from 1.4 to 3.5 million. The CRFM has five sheds (one currently vacant); unlike the other state-run markets, the CRFM lacks wholesale facilities and a restaurant. Many people we spoke to discussed the access and location challenges of the CRFM, believing it to be inconveniently located, not close to residential density, and not served by existing public transit lines. Several farmers and other stakeholders also noted the lack of clear

communication that distinguishes between vendors who are producers/farmers and sell only what they grow, and produce resellers, who might have products of distant origin (this issue is present at many of the city's markets; see below).

The Matthews Community Farmers' Market, Charlotte Open Air Market, and Atherton Market (clockwise from left) are three of Mecklenburg County's 23 active farmers' markets.

Despite its shortcomings, the CRFM is a significant asset for the city. Only a small number of states have state-run farmers' market systems, and certainly not every city of Charlotte's size has a farmers' market approaching the footprint scale of the CRFM. The market draws far more visitors, features far more vendors, and offers much wider operating hours than any of the city's other markets.

INDEPENDENTLY RUN MARKETS

All of Charlotte's and Mecklenburg County's farmers' markets are run independently of each other. Aside from some limited informal information-sharing, they do not coordinate locations, hours, best practices, vendors, or marketing. This creates a market landscape that is less than ideal, both for farmers, who must navigate multiple vendor applications, guidelines, and, by some accounts, a diluted customer base, as well as for shoppers, who lack clear and consistent messaging about the city's markets and a range of operating hours to meet the needs of diverse schedules (most markets are held on Saturday mornings).

Market managers who participated in this study (through interviews or focus groups) generally expressed interest and enthusiasm for the idea of a shared platform for collaboration and coordination. They see much to be gained in terms of joint marketing, resource sharing, and technical assistance. At the same time, they clearly expressed the importance that it be a grassroots organization, with market managers driving its agenda and priorities – not, for example, with the city stepping into a leadership role, though support and coordination from the city would be welcome.

Some managers were cautious about too much standardization though, emphasizing that the unique character of each of the city's markets is an important asset that should not be subsumed by a city-wide farmers' market brand.

"I would love more coordination. A farmers' market board."

- Market Manager

PRODUCE RESELLERS, 'LOCALLY GROWN' AND FARMER-VENDORS

Many farmers and other stakeholders lamented the inconsistency and lack of clarity around produce resale and definitions of 'local' at the city's markets. Several markets, including the CRFM, allow produce resale, including of non-local products (such as bananas), while other markets, such as the Matthews, Davidson, and Cotswold markets, have explicit guidelines for farmer-vendors and distance.

This lack of clarity creates confusion for uneducated shoppers, who may not realize that a tomato (or even a banana) purchased from a reseller may not have been grown locally. Farmers expressed frustration that resellers are able to offer lower prices without clearly conveying the provenance of their products. At the same time, some resellers do source locally grown products, and are thus an important wholesale outlet for some of the region's farmers. There is a range of activities to be considered with respect to resale and produce type:

- Resale of produce that cannot be grown in the region (such as tropical fruits like bananas and pineapple)
- Resale of produce that can be grown in the region, but is not sourced from within the region (such as tomatoes from Florida)
- Resale of produce that is grown within the region, and sold by a pure reseller (such as tomatoes grown in Rowan County, sold by a produce wholesaler)
- Resale of produce that is grown within the region, and sold by a farmer-vendor who did not produce it (such as fruit grown by a vendor in Cabarrus County and sold by a vegetable farmer who wants to diversify her retail product offerings)
- Sale of locally grown produce, sold by the farmer that grew it

Some farmers' markets elsewhere in the U.S., such as the Overland Park Farmers' Market in Kansas, seek a balance by allowing produce resale, but only of products that cannot, at that point in the season, be grown within the region. Of course, an agreed-upon definition of 'local' or 'regional' is another important consideration in these distinctions.

Stakeholders acknowledged that resellers have legitimate businesses, are filling a market niche, and offer many benefits, such as drawing people to the market and offering variety and competitive prices. The produce resale businesses seem especially important to immigrant communities, both as an opportunity for immigrant entrepreneurs, and to purvey culturally specific products that might not be available at supermarkets or other traditional outlets. Thus, farmers and stakeholders do not want to shut resellers out of farmers' markets, but rather to create clearer communication that highlights locally grown foods and helps shoppers navigate the markets' offerings.

Stakeholders want clearer communications and marketing that do a better job of highlighting locally grown foods.

MARKETING AND EDUCATION

The need for robust marketing and education was one of the most consistent themes in our stakeholder engagement. As many people noted, food (and shopping for food) is deeply cultural, and thus any significant "movement of the needle" will only come about as the result of meaningful cultural change. Education about the value and benefits of fresh, healthy, locally grown food is critical, especially in tandem with marketing efforts that link these education efforts to information about the city's farmers' markets.

"[The city's farmers' markets] are missing this huge opportunity to band together with branding and marketing. If you had a joint media and market – with locations, times, hours – there's untapped potential there."

- Charlotte region farm and food economy expert

Wholesale activity in Charlotte

LAGGING WHOLESALE CONNECTIONS

Wholesale activity is a critical lever in the growth of a regional food economy. Farms in the Charlotte region seem to be lagging in development of wholesale market channels: just 201 farms, or 2.7% of the region's total farms, participated in wholesale direct-to-retailer sales in 2012, compared to 4.4% of farms in all of North Carolina. Among its benchmarking cohort, the Charlotte region ranked 8th out of 11 regions for this metric.

Anecdotally, wholesale distributors who operate across the state observed a lack of farmers operating at wholesale scale in the Charlotte region compared to other parts of the state. These distributors sell into the Charlotte market but do not source product from the region to a significant degree.

Freshlist is a new business that is creating new wholesale connections within the region by focusing on restaurant buyers. Because restaurants are relatively small buyers, Freshlist's volumes are smaller than the state's larger distributors, but several people on both sides of the Freshlist supply chain (farmers and restaurants) have noted what a needed service and value-add Freshlist is providing.

"It's difficult for small farmers to meet the large quantity demands [of wholesale]."

- Farmer

DIRECT-TO-RETAILER WHOLESALE SALES IN BENCHMARK COMMUNITIES: FARMS AND PERCENT OF ALL FARMS

Asheville MSA	9.3%	264
Hartford MSA	8.8%	175
Rochester MSA	7.8%	332
New Orleans MSA	6.1%	63
Raleigh MSA	4.9%	122
Grand Rapids MSA	3.5%	165
Milwaukee MSA	3.5%	61
Charlotte MSA	2.7%	201
Minneapolis MSA	2.2%	288
Austin MSA	1.7%	152
Kansas City MSA	1.0%	132

TRANSITIONING INTO WHOLESALE

Scaling up to meet the needs of wholesale clients can be a big leap for small farmers who have focused on direct retail. The volumes required are much larger, product quality and consistency are crucial, and many clients require certifications such as GAP (Good Agricultural Practices). Farmers need training, "onboarding," infrastructure, and technical assistance when making this transition. The benefits of stronger wholesale market channels are clear, however; even though per-unit prices are lower than in direct retail, the higher volumes and reduced marketing labor per unit lead to economies of scale that can generate greater returns for farmers.

FARMERS' MARKETS AND WHOLESALE LINKAGES

The city's farmers' markets play a role in introducing buyers (chefs, especially) to the region's growers. Chefs

The Harris Teeter grocery chain actively promotes its local sourcing of produce, though in this case, this green cabbage comes from over 200 miles away from Charlotte.

visit farmers' markets, not just to purchase products, but also to get a sense of what products are being grown and who the growers (and potential purveyors) are. These interactions are improvised and ad hoc, however, without any formal platform or structured framework for connecting buyers to growers. Farmers' markets are well-suited to play such a role, and could be better leveraged to foster these connections.

Food access and food security in Charlotte

Food security is defined as access to healthful, affordable, and culturally appropriate food at all times, with access including geographic, economic, and cultural dimensions. Farmers' markets can play a role in improving food access, especially with SNAP and Double Bucks programs, though food insecurity is a complex phenomenon and farmers' markets are not a "magic bullet" in solving food access challenges.

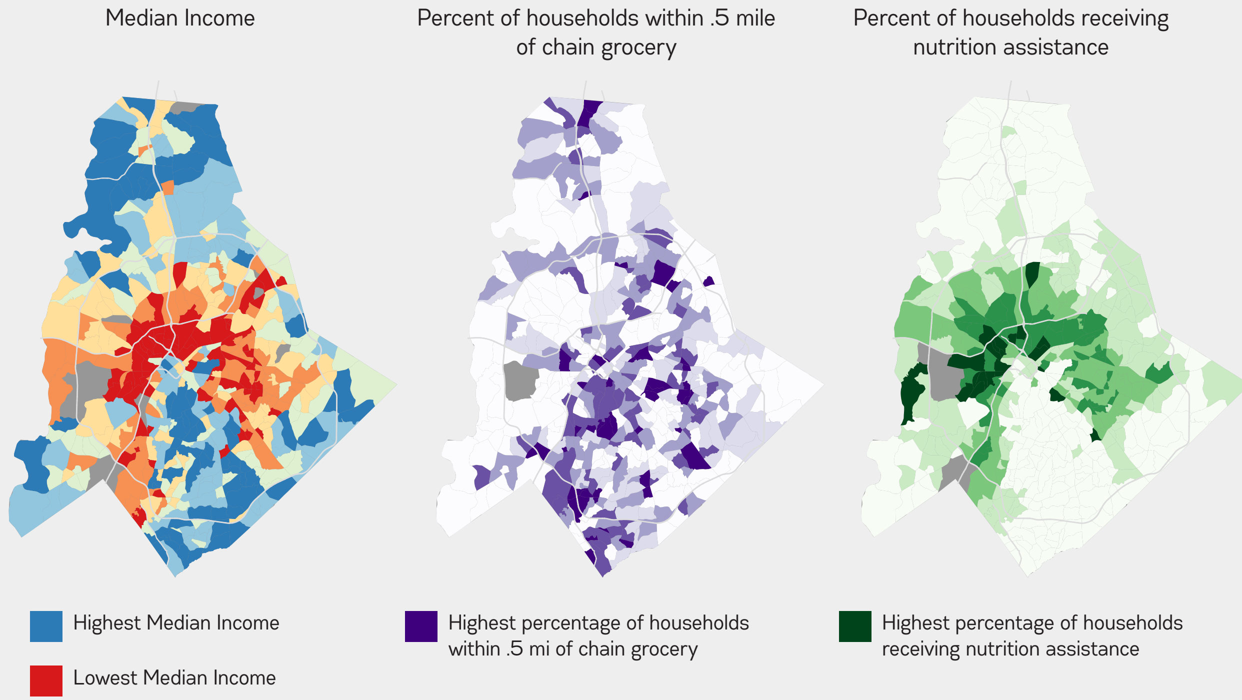
Feeding America estimates that Mecklenburg County's food insecurity rate is 16.4%, or about 173,000 people. This rate is roughly consistent with North Carolina's (16.5%), but higher than the national rate of 13.4%. Not everyone who is food insecure qualifies for SNAP assistance, and Feeding America estimates that nearly one-third of Mecklenburg County's food insecure residents are ineligible for SNAP. Even so, more than one in ten households in the City of Charlotte are enrolled in SNAP.

There are many organizations in Charlotte and Mecklenburg County working to improve food security at a range of scales, from county-wide to neighborhood-level. The Charlotte-Mecklenburg Food Policy Council (a member of this project's consultant team), completed an in-depth study of food access in Mecklenburg County in 2015. That report identified a number of key opportunities, two of which are particularly relevant to the city's farmers' markets:

- "Develop more points of food access that are accessible by walking or by public transportation, such as farmers markets or produce stands at transportation hubs, community centers, libraries, schools, churches, mobile markets, grocery store delivery or drop-off points."
- "Support programs that give low-income and food insecure households increased buying power, such as:
  - » Double SNAP dollars
  - » Fruit and Veggie Prescription program
  - » Increase SNAP and WIC availability to 100% of full-service stores in Mecklenburg County ."

These opportunities can inform more strategic farmers' market planning and programming to better address the city's food access conditions.

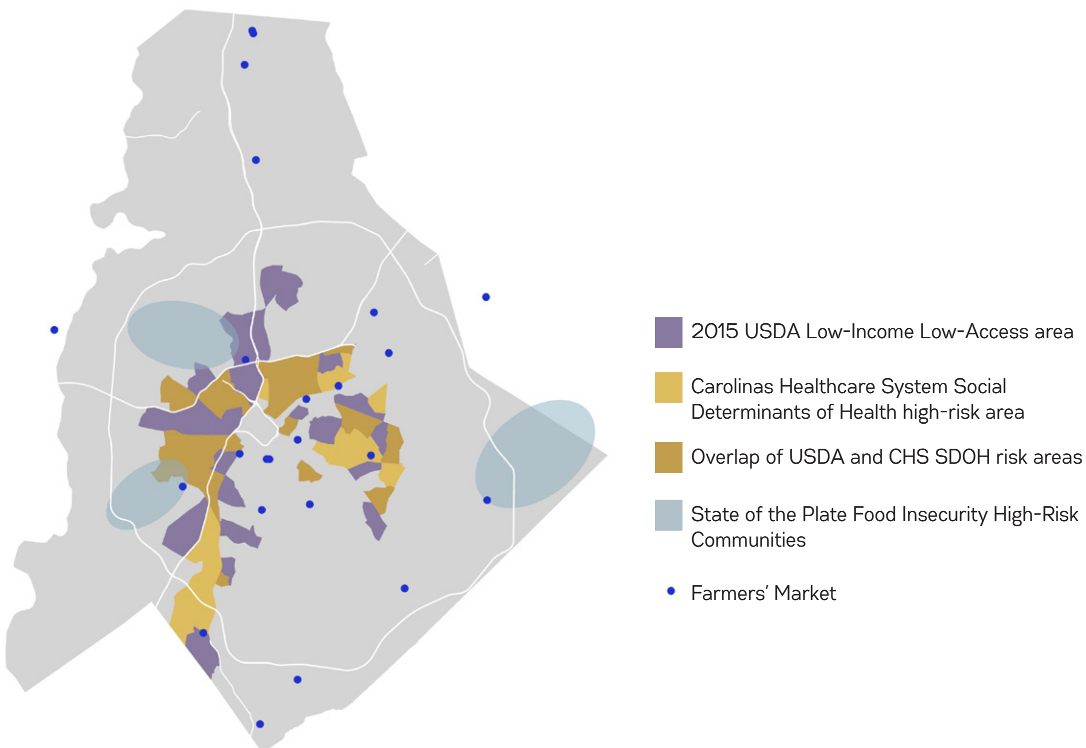
FOOD SECURITY INDICATORS IN MECKLENBURG COUNTY



GEOGRAPHY OF FOOD ACCESS

There are many ways of assessing the geography of food access. The USDA low-income low-access (or "food desert") measure identifies census tracts that a) have either a high number or high proportion of

FOOD INSECURITY MEASURES AND FARMERS' MARKETS IN MECKLENBURG COUNTY



low-income residents, b) are more than ½-mile from a supermarket (for urban tracts), and in one version of the measure, c) have a high number or proportion of households without a vehicle. By these criteria, the USDA identifies large swaths of Charlotte as food deserts, especially in West Charlotte, Northeast Charlotte, and East Charlotte. The State of the Plate report also identified high-risk communities, and a Carolinas HealthCare System (now Atrium Health) initiative identified high-risk areas based more broadly on social determinants of health; see the map above for a visualization of these various assessments. Additional maps of the county's median income, household distance to chain grocery, and households receiving nutrition assistance, found on the previous page, add some nuance but are generally consistent with the USDA, CHS, and State of the Plate areas.

"Just for people to get food – using public transportation – can require hours-long trips, with perishable items."

- Food access stakeholder

SNAP ACCEPTANCE AT FARMERS' MARKETS

The USDA Supplemental Nutrition Assistance Program – SNAP, or food stamps – is accepted at just three farmers' markets in Mecklenburg County: the Rosa Parks, Cotswold, and Davidson farmers' markets[11]. The Rosa Parks and Davidson markets offer Double Bucks programs, which double the buying power of SNAP dollars. Although the county's other markets do not have centralized SNAP acceptance, some individual farmers have opted to set up their own SNAP redemption systems at farmers' markets.

Nationally, based on the USDA farmers' market registry, about 1 in 3 U.S. farmers' markets accept SNAP. Mecklenburg County, at fewer than 1 in 7 markets, thus severely underperforms compared to the U.S. as a whole. This is consistent with findings from the benchmarking cohort, where Charlotte is ranked last for number of SNAP-authorized farmers' markets per 10,000 households on SNAP.

11 / Two additional markets – the Seeds for Change / West Blvd. Neighborhood Commission market and the Carolinas Healthcare System/Atrium Health-University Hospital market are likely to accept SNAP in 2018. Atherton Market is listed by the USDA as a SNAP-authorized market, but to our understanding Atherton was not accepting SNAP in 2017. USDA additionally lists "New Africa of Charlotte" as a SNAP-authorized farmers' market, but we have not been able to identify or confirm any details about this market.

SNAP ACCEPTANCE AT FARMERS' MARKETS IN BENCHMARK COMMUNITIES (2018)

Cities

	# of markets	markets per 10K households on SNAP
Asheville	8	20.17
Minneapolis	19	6.90
Kansas City	12	4.48
Austin	12	4.37
New Orleans	9	2.99
Rochester	8	2.78
Raleigh	4	2.73
Hartford	5	2.43
Grand Rapids	3	2.12
Milwaukee	13	1.93
Charlotte	6	1.78

Core Counties

	# of markets	markets per 10K households on SNAP
Buncombe County (Asheville)	9	9.48
Hennepin County (Minneapolis)	25	5.51
Wake County (Raleigh)	10	4.09
Travis County (Austin)	13	4.03
Jackson County (Kansas City)	13	3.67
Kent County (Grand Rapids)	9	3.32
Orleans Parish (New Orleans)	9	2.99
Monroe County (Rochester)	9	1.99
Mecklenburg County (Charlotte)	7	1.89
Hartford County (Hartford)	11	1.82
Milwaukee County (Milkwaukee)	14	1.75

MARKET PLACEMENT

One of the initial assumptions of this study was that the geography of the city's existing markets is not responsive to the geography of food access and food insecurity. This assumption is somewhat borne out in the map on the previous page, which illustrates that the city's markets tend to be clustered in areas not deemed as high-risk – especially the city's South/Southeast quadrant – while some of the city's largest high-need areas have no farmers' markets at all. This dynamic was also qualitatively underscored through our interviews with stakeholders, many of whom noted that investment and resources for markets (and many other neighborhood amenities) tend to flow toward neighborhoods that are already highly resourced.

Transportation is another central consideration in food access. Even when farmers' markets are not located within high-need areas, public transportation can connect high-need populations to markets. Inaccessibility by public transit is one of the main shortcomings of the Charlotte Regional Farmers Market, as it is not currently serviced by any city bus lines. The City's Blue Line extension, along with other planned new transit lines, such as the Gold, Silver, and Red lines, present opportunities to create better market access for larger portions of the city's population.

"It's not about doing for, it's about building wealth creation processes and capital in communities that haven't had the luxury of benefitting from it."

- Market Manager

"Food should be an equalizer, not a separator."

- Food access stakeholder

SUMMARY OF ASSETS, GAPS, AND OPPORTUNITIES

Our research into Charlotte's farmers' markets and regional food system indicates a number of opportunities to better leverage the community's existing assets, bridge or overcome its gaps, and connect and coordinate complementary efforts. These opportunities are summarized below.

EDUCATION AND MARKETING

As numerous stakeholders acknowledged, a change in eating patterns is a change in culture; it does not happen easily or overnight. The development of a place-based culture of eating that celebrates a community's agricultural and culinary heritage while embracing innovation and healthful eating is a long-term and multi-dimensional project, a project in which many stakeholders and initiatives in the Charlotte region are already engaged. Education and marketing initiatives that help the region's eaters understand the benefits and pleasures of eating locally will benefit the area's farmers' markets, farmers, and broader economy.

MARKET COLLABORATION AND STRATEGY

The city's existing farmers' markets are testaments to their communities' entrepreneurship, creativity, and dedication to cultivating a local food economy. The proliferation of markets across the city speaks to an energy and momentum for market activity, but the lack of coordination or collaboration among these markets is a missed opportunity for greater impact. A framework for collaboration and a systemic approach to the city's markets will better leverage the energy and talent of the city's current and future market managers, and will allow resources to be more strategically used to improve food access and market connections across the city.

SUPPORTING THE LOCAL FOOD SUPPLY

As Charlotte and Mecklenburg County grow in population, so too will their demand for locally grown food – especially if the trends in buying local food are cultivated and continue. The preservation of farmland and farming as a viable career and way of life in the region will be critical to developing a robust and thriving regional food economy. Coordinated initiatives that pursue these goals are key to maintaining, supporting, and expanding the production of food in the region.

NURTURING WHOLESALE CONNECTIONS

Wholesale activity is a marker of a maturing regional food system. As farms expand and scale beyond direct marketing, they need strong wholesale channels to grow into. The Charlotte region has tremendous room for growth in wholesale activity, in both supply and demand. Increased local sourcing by area restaurants, the emergence of new marketing models like Freshlist and Produce Box, and the prominence of local sourcing at supermarkets like Harris Teeter all indicate untapped potential to get more regionally grown food to Charlotte residents via wholesale channels.

COMMUNITY BUILDING AND PLACEMAKING

Successful farmers' markets can have a multitude of community impacts. They connect residents to their regions through the experience of eating; they promote healthy eating of fresh, seasonal foods; they support urban-rural economic linkages; and they create connections both within and beyond their communities by stimulating interactions between residents, visitors, and farmers. Farmers' markets can and should be a vibrant expression of their communities. Increased collaboration and commitment to supporting the city's markets will extend their impact.

"It's a culture shift – what we eat is tied to our culture. Making that shift takes time."

- Food access stakeholder

ROOM FOR GROWTH

Perhaps the most striking finding from the benchmarking research is the extent to which Charlotte and the Charlotte MSA underperform in two key metrics: direct-to-consumer sales, as an indicator of the regional food economy, and SNAP acceptance at the city's farmers' markets. Yet these two indicators can be interpreted positively: Charlotte has the potential for significant improvement. Charlotte has the third highest median income of its benchmarking cohort, so there is every reason to believe that with education and marketing, the region's direct-to-consumer sales could increase substantially. And a coordinated effort to increase SNAP acceptance at the city's farmers' markets could improve food security for the city's underserved residents, particularly if a city-wide Double Bucks program were also launched.

Finally, it is also important to acknowledge that this project is not occurring in isolation; and indeed, there are a number of complementary efforts that indicate this initiative is quite timely. Atrium Health, formerly Carolinas HealthCare System, recently committed to

making food access its top priority community health pillar. There is emerging momentum for the creation of a voluntary agricultural district in Mecklenburg County, which could help to preserve the county's remaining farmland. And the emergence and growth of West Charlotte projects like the Rosa Parks Farmers Market and the Seeds For Change food hub are improving the food access landscape of those underserved areas. These initiatives and others indicate great promise for the growth of the regional food economy and its ability to better serve all of the city's residents.

Our aim with the following section – Recommendations and Implementation Plan – is to offer a set of complementary recommendations that responds to the conditions and opportunities revealed by our research and lays the groundwork for a future-oriented farmers' market system that capitalizes on Charlotte's strengths, unique assets, and culture.

RECOMMENDATIONS AND IMPLEMENTATION PLAN

RECOMMENDATIONS

Based on the key opportunities and needs revealed by our research, the following recommendations offer a combination of near, medium, and long-term strategies that will leverage the region's assets while bridging its gaps. These recommendations are detailed on the following pages:

1. Create a Charlotte Farmers' Market Association.
2. Pursue improvements to the Charlotte Regional Farmers Market.
3. Explore opportunities for new public markets and large-scale farmers' markets.
4. Maintain and increase the production of food in Charlotte's 'foodshed', especially by supporting career pathways and improved livelihoods for the region's farmers.

The initial platform of our research was organized around four topics: farming and food production, the farmers' market landscape, wholesale activity, and food access and food security. Our four recommendations do not align with these topics in a one-to-one manner; rather, the recommendations are cross-sectoral systemic interventions which are intended to have multiple impacts across those areas. The regional farm economy, including its wholesale activity, will be improved through better market channels, a strengthened culture of 'eating local', and support for the region's farmers. The market landscape will be improved through coordination, improvements to existing markets, and strategic planning for future markets. Food access will be improved through expanded SNAP acceptance and a market system that better responds to the city's geography of food insecurity.

The successful implementation of these recommendations will require the engagement of diverse stakeholders and organizations. Some activities may be led by the City of Charlotte, while for others, the City may play a role of convener, facilitator, or champion to support the work of other organizations. The recommendations proposed here offer opportunities for near-term wins and long-term ambitious planning, and provide a roadmap for Charlotte to pursue a future-oriented food system that better serves the needs of all its residents and celebrates a place-based culture of food.

RECOMMENDATION 1

Create a Charlotte Farmers' Market Association.

OBJECTIVE

To coordinate and strengthen the city's existing and new farmers' markets through an entity governed by farmers' market managers and sponsors and supported by paid staff.

RATIONALE

The City of Charlotte has a large number of farmers' markets (16 separate markets operated in 2017) but all are independently organized and operated, with a resulting lack of coordination, marketing, and sharing of knowledge and other resources. In numerous cases, the organizers of new farmers' markets have started without any background or experience with markets. While many market managers know each other, there are currently limited opportunities for managers and organizers to learn from each other or create efficiencies when they have redundant tasks, or to have a shared voice to advocate for common needs.

Recognizing that the city's farmers' markets vary widely in history, scale, ownership, management structure, and mission, the proposed approach is to create a voluntary network that helps build stronger and more visible markets. By creating a structure for communication, collaboration, marketing, and education, the city's individual markets will be able to

cultivate more effectively a culture of eating locally and seasonally – with farmers' markets as a key component.

The Charlotte Farmers' Market Association (CFMA) is envisioned as a collaborative working group driven by the priorities and needs of its participating members and led by market managers, with technical and administrative support provided, at least in its first few years, by partners such as the city, county, and other sponsors. Since it is neither desirable nor feasible to require markets to participate, the proposed association will be most successful if it is organized and led by market managers and has access to resources that benefit the participants.

ACTIVITIES & PRIORITIES

Leadership of the CFMA will periodically determine the issues it wishes to address. Based on the consultant team's work, initial priorities are recommended to be:

- Expansion and promotion of SNAP, Double Bucks and other food assistance programs at the city's farmers' markets (perhaps including a common market token program that can be used across markets). The benchmark finding that Charlotte ranks lowest among the cohort for SNAP-authorized markets per 10,000 SNAP-enrolled households underscores the urgency of this effort.

- Marketing and promotion, which will require a city-wide brand development and customer targeting strategy that can be customized for use by individual markets
- Sharing of best practices
- Coordinated farmer applications
- Common farm inspections
- Coordination of emergency food providers to pick up surplus, end-of-day foods
- Engagement with city zoning to create a consistent and supportive legal framework across the city
- New market orientation and planning assistance

Potential future activities might include:

- Identification of the association's long-term funding strategies so it can operate sustainably (likely to include a mix of dues, fees, fundraising, grants, and earned income)
- Farmer recruitment and referrals
- Manager training and technical assistance
- Common definitions of local, reselling, and other key messaging terms
- Creation or identification of shared education curricula and demonstration programs for use at farmers' markets
- Engagement with urban agricultural initiatives that can utilize farmers' markets
- Connection of farmers to wholesale buyers
- Advocacy, such as lobbying for investment in farmers' market facilities and programs
- Research into the benefits and impact of Charlotte farmers' markets
- Identification of promising locations for new farmers' markets

ROLE OF THE CITY

Although the City of Charlotte will not have a lead role in the long-term governance of this initiative, the city's support and involvement will likely be critical to a successful launch. In particular, the city may provide:

- Partial seed funding (in partnership with local foundations and corporate sponsors)
- A commitment to sustaining the Farmers' Market Task Force (which has guided this project to date) to support the work of the association

KEY PARTICIPANTS & PARTNERS

Although the CFMA should be led by market managers, the group will benefit from some non-market manager perspectives. Thus, the CFMA leadership could include:

- Farmers' market managers (majority of leadership)
- Representatives from sponsoring organizations
- Food system/consumer advocates
- Food professionals, such as chefs or food educators
- Representative(s) of the City's Farmers' Market Task Force

POTENTIAL IMPACTS & BENEFITS

In the short term (1-3 years), a successful CFMA will likely see positive impacts including:

- Support and increased efficiency for market managers
- Efficiencies and improved clarity for farmers
- Expanded marketing and education, leading to increased visits and consumer support for farmers' markets
- Expanded use of SNAP and Double Bucks

In the longer term (3-5 years and beyond), a successful CFMA will have enabled the establishment of a robust and collaborative network of farmers' markets that see sustained and increasing patronage, retention and growth of regional farmers, and a shift in culture to more local eating.

IMPLEMENTATION & TIMEFRAME

Steps toward the creation of the CFMA can be taken immediately, and its activities can be ongoing and continue indefinitely. Near-term steps should include:

1. Identify a host nonprofit or public entity that can provide fiscal sponsorship and legal/organizational support so the nascent organization can focus on

programs and services

2. Determine a three-year budget and identify funding sources
3. Invite market managers and supporting participants to begin meeting and work
4. Develop a three-year plan: objectives, priorities, governance structure, path to fiscal sustainability
5. Identify an executive director or coordinator: job description, key experience/qualities, recruit and hire

COST & FUNDING

Top-line expenses in the near term will include:

- Executive director/coordinator compensation
- Budget for joint marketing efforts (branding, print materials, website development, advertising)
- Administrative fees to host organization

Start-up funding sources might include:

- City and county appropriations
- Foundation grants
- Corporate sponsor grants, especially from health care sector

Funding for SNAP promotion and a Double Bucks program could likely come from a range of potential supporters, especially philanthropic and health-focused partners.

NATIONAL MODELS FROM BENCHMARK COMMUNITIES

The Farmers' Markets of Minneapolis Collaborative

The Farmers' Markets of Minneapolis Collaborative is a young organization that began as an ad hoc collaboration for a University of Minnesota-led research project.

Learnings and relevance for Charlotte

Like Charlotte, Minneapolis had many independently run farmers' markets (over 30 in some years) – and no platform for coordination prior to the formation of this organization. The initiative thus has a number of lessons and dimensions relevant to Charlotte:

- A tangible pilot project. The organization's pilot project – a metrics and data collection effort for a university-led research project – gave the participant markets and market managers a concrete activity to coalesce around. The research project, which was grant-funded, provided some stipend support for participating managers, incentivizing their participation. As an added benefit, the metrics project is focused on measuring the positive impacts of the city's farmers' markets – so market managers are simultaneously building infrastructure for their own collaboration network while they gather data that supports and rationalizes their work.
- Governance structure and staffing. Although the collaborative has over 20 participating markets, it has a much smaller leadership team, which consists of five market managers, one faculty researcher, and one city staffer (whose title is Homegrown Minneapolis/Local Food Policy Coordinator, housed in the city's Sustainability Office; according to the coordinator, about 20-25% of her time is devoted to the farmers' market work). The leadership team was not officially selected or voted on, but rather emerged organically from the market managers who were interested in participating to that degree. Although the city's coordinator has had a major role in forming, supporting, and advancing the collaborative, she does not drive the agenda: "I've come at this from the position of: I'm not going to tell you what to do, I'm going to create the table for the conversation[1]."
- Strategic plan. The organization created a strategic plan shortly after being formed. The plan defines success factors, provides vision, mission, and values statements, and describes action plans for four strategic priorities. The strategic plan is included as an appendix to this report.
- Relationship building. The relationship-building function of the coordinator is key: getting to know individual market managers and their markets is a critical step in creating a collaborative environment and shared platform and goals for the group.
- Diverse funding. The organization operates with diverse sources of funding and in-kind support, from corporate, foundation, and government supporters including the City of Minneapolis, Funders Network, General Mills Foundation, Greater Twin Cities United Way, McKnight

1 / Interview with Tamara Downs Schwei, Homegrown Minneapolis/ Local Food Policy Coordinator, conducted by Ben Kerrick, Dec. 20, 2017.

Foundation, Minnesota Department of Agriculture, Minnesota Department of Health Statewide Health Improvement Partnership, the University of Minnesota, and the USDA.

- Incremental expansion of activities. Since the group's pilot research project, their activities have expanded to include a website (with interactive map for consumers and portal to information for farmers/vendors), SNAP/EBT promotion and Market Bucks, development of a brand identity and promotional campaign, and technical assistance for farmers.

Cultivate Kansas City

Cultivate Kansas City is a non-profit organization that supports food, farms, and community in the greater Kansas City region. Although it does not operate its own farmers' markets, Cultivate KC promotes and shares information about the region's markets. Importantly, Cultivate KC spearheads Double Up Food Bucks Kansas City through its Beans & Greens program, a coordinated effort to manage and grow the region's SNAP matching program.

Learnings and relevance for Charlotte

Cultivate KC co-founded and leads the local Double Up Food Bucks program, which is now funded by nearly 20 partners, including health-oriented corporations and foundations, family foundations, government organizations, and others. The program is accepted at 20 farmers' markets throughout the area. These funders might provide inspiration for Charlotte-area philanthropies, and could provide a useful model for a CFMA funding strategy for a city-wide or regional Double Up Bucks program.

Cultivate KC is a $1 million agency founded in 2005 that receives about $850,000 annually in contributions and grants. Beans & Greens represents one-quarter of the organization's expenses.

Market Umbrella

Market Umbrella in New Orleans operates four weekly farmers' markets under the shared brand of Crescent City Farmers Market. The organization also offers knowledge sharing for markets through its Marketshare platform.

Learnings and relevance for Charlotte

Market Umbrella provides a model of joint marketing and branding for multiple farmers' markets. Its Marketshare platform has educational resources that may be useful for Charlotte market managers, and it also illustrates how best practices can be shared across markets.

Farmers Market Coalition

The Farmers Market Coalition, a national organization, has an extensive resource library[2] available to farmers' market operators. Resources include the Power of Produce educational curriculum[3], which could be a part of a shared educational campaign, and a SNAP guide for farmers' markets[4].

2 / farmersmarketcoalition.org/education/resource-library/

3 / farmersmarketcoalition.org/programs/power-of-produce-pop/

4 / farmersmarketcoalition.org/education/snap/

RECOMMENDATION 2

Pursue improvements to the Charlotte Regional Farmers Market.

OBJECTIVE

To leverage and maximize the impact of the Charlotte Regional Farmers Market through programming, access, and facility improvements.

RATIONALE

The state-owned and operated Charlotte Regional Farmers Market (CRFM) is a valuable community asset because it is the area's largest farmers' market, serves a diverse population of consumers, and is a dedicated 22-acre facility with permanent infrastructure including open and enclosed sheds. However, CFMA does not appear to be meeting its potential as a destination market for the city: visitor counts are low compared to peer markets in the state, the Market is regarded by many as hard to get to and/or inconveniently located, many sellers don't accept SNAP and there is no Double Bucks program, and unlike other NC state-run markets, it lacks wholesale infrastructure and other key amenities (such as a restaurant). A variety of short and long-term improvements to the CRFM can help it better serve the region's farmers and consumers.

ACTIVITIES & PRIORITIES

Recommended near-term activities and priorities include:

- Market research to understand more about the Market's existing customers and farmers, particularly the opportunity to expand SNAP usage. Survey work could be performed in partnership with local universities. Survey research might include an intercept survey conducted at the CRFM to learn more about who shops there now, and a community internet survey, which will provide information about why people do and do not shop at the CRFM and explore ideas for attracting more customers.
- Launch of a centralized SNAP acceptance and Double Up Bucks program (potentially in collaboration with the recommended Charlotte Farmers' Market Association).
- Improved access and visibility. Initiatives might include shuttle buses, signage, a new entrance from Billy Graham Parkway, and connector through-streets to the developments around the Market. In particular, planned intersection

improvements as part of the City Park development have been delayed; the city should affirm the need for a better intersection at the Billy Graham Parkway.

- Clearer on-site communication and signage to highlight local producers and locally-grown seasonal products, while still supporting the businesses of resellers.
- Marketing and educational programming in collaboration with the Charlotte Farmers' Market Association.
- Partnerships to support these initiatives.

Longer-term activities will include:

- Feasibility analysis and master planning to determine program and design changes that can enhance retail and wholesale functions, placemaking, and education.
- Identification of funding sources and advocacy for capital improvements.

ROLE OF THE CITY

Since the Regional Market is owned and operated by the North Carolina Department of Agriculture and Consumer Services, any improvements or initiatives must be pursued in close partnership with the State. The City can play a critical role of convener and collaborator, with activities including:

- Convening state, nonprofits, and funders to address this opportunity
- Support for the SNAP program
- Help to address access and visibility issues, especially via improved intersection at Billy Graham Parkway
- Protect zoning of the market's surroundings to maintain the viability of the market
- Help to fund and guide the master planning process

KEY PARTNERS

Key partners for this initiative will include:

- NC Department of Agriculture and Consumer Services
- Charlotte Farmers' Market Association (Recommendation 1)
- Sponsor organizations and funders

POTENTIAL IMPACTS & BENEFITS

Successful improvements to the CRFM will achieve a number of benefits including:

- Food access improvements: the CRFM has the potential to be the area's largest farmers' market SNAP and Double Up Bucks redemption point
- Increased farmer sales
- Re-introduction of local food wholesaling, leading to increased wholesale activity
- Value-added production and jobs
- Education
- Improved social/gathering space

IMPLEMENTATION & TIMEFRAME

Many of the simpler programming improvements can be achieved in the short term, while master planning and other more significant improvements will be medium- to long-term initiatives. Near-term implementation activities will include:

- Identification of a lead partner to assist with SNAP implementation
- Partnership development between state, city and local funders to support master planning effort

COST & FUNDING

Top-line expenses for these improvements will include:

- SNAP program (including Double Up Bucks) implementation
- Education and marketing budget – possibly in partnership with CFMA (Recommendation 1)
- Funding for access improvement pilot, such as a shuttle bus
- Master plan costs and implementation budget

NATIONAL MODELS FROM BENCHMARK COMMUNITIES

The Rochester Public Market

The Rochester Public Market operates the country's largest SNAP token program, with over $1 million of tokens redeemed by Market vendors annually. A city-owned and operated facility, the Rochester Public Market recently completed a master plan that led to construction of a new farmers' market shed and a new indoor market hall. The Market also operates a shuttle tram that ferries customers from outlying parking lots to the Market.

The Hartford Regional Market master plan reimagines the decades-old wholesale facility to include more consumer-facing retail and education opportunities.

Learnings and relevance for Charlotte

Rochester's program demonstrates the potential of facility-based markets to serve low-income consumers. The SNAP token program is operated by Friends of the Rochester Public Market, which provides a model for a third party entity that operates a SNAP program in cooperation with a public agency. The City provides the Friends group with space in the Market for a shipping container that has been converted into an office and teller window for transferring EBT benefits to Market tokens.

The Rochester Public Market utilized a master planning process that included substantial market research and community engagement to identify optimal strategies for improving the Market and guiding capital and programmatic investment. A similar process can benefit the Charlotte Regional Farmers Market.

The Friends of the Market raised funds from USDA to purchase the parking shuttle.

Western North Carolina Regional Farmers Market

Western North Carolina Regional Farmers Market also utilized a master planning process to create a 20-year investment plan to replace aging infrastructure with facilities that would maximize the benefits to regional farmers and the community.

Learnings and relevance for Charlotte

The Western NC Regional Farmers Market shares numerous characteristics with the Charlotte Regional Farmers Market, although it also has robust wholesale farmers' market components. The Charlotte Regional Farmers Market would benefit from upgraded facilities and the addition of wholesale functions. Based on the comprehensive plan, the state has recently provided $4 million in funding to begin making improvements, including glass garage doors on the retail sheds. Since the full plan would require substantially more funding, perhaps investment plans from multiple state-owned farmers' markets would encourage the state legislature to devote capital resources to the state's market system. The 2014 master plan was completed for a budget of $100,000, which included limited resources for design, engineering and construction cost estimating.

The Hartford Regional Market

The Hartford Regional Market also developed a master plan to replace an aging market facility. The plan proposed substantial investment by the Market's wholesale distributors while the state would create a new retail market shed and educational facilities.

Learnings and relevance for Charlotte

The extensive Hartford Regional Market Master Plan provides another example of thoughtful planning to improve a state-owned market facility. Though this market has struggled to maintain its mainline produce distributors, it has added a number of locally-owned food producers and distributors, including a very successful local dairy cooperative, The Farmers' Cow. The Hartford Regional Market Master Plan was created for a budget of $413,500, and included substantial design and cost estimating components.

RECOMMENDATION 3

Explore opportunities for new public markets and large-scale farmers' markets.

OBJECTIVE

To explore the feasibility and create conceptual plans for new permanent farmers' market and public market facilities at accessible locations around Charlotte.

RATIONALE

The Charlotte Regional Farmers Market shows the potential of a larger scale farmers' market that operates from a permanent structure with farmer and customer amenities. The city's rapid growth and favorable demographics suggest opportunities for one or more large-scale farmers' markets or public market facilities at accessible sites elsewhere in the city, removed from the CRFM. In particular, new light rail transit stations might provide good locations to develop market facilities such as farmers' market pavilions and an indoor public market hall. These facilities might be within or adjacent to park-and-ride lots which have limited use on weekends and which would benefit from active placemaking and expanded public transit utilization. The city's existing pop-up markets could also benefit from permanent infrastructure and on-site amenities.

A "public market" is defined as a mission-driven public place for independent, primarily fresh and specialty food vendors to sell their products, with a focus on locally grown or produced items. The missions of new public markets often reflect the desire to support local entrepreneurs and regional farmers, create jobs, provide food access, and create public spaces that welcome and serve the entire community. By contrast, a "food hall" is a collection of independent prepared food vendors or mini-restaurants, which do not necessarily have any commitment to local sourcing.

ACTIVITIES & PRIORITIES

A public market feasibility and concept development plan typically includes:

- Goal refinement and public engagement
- Market research, exploring consumer demand, potential supply of vendors, competition, and partnerships
- Site identification and analysis
- Merchandising and tenant mix plan
- Facility and site design
- Ownership and management options and key operating policies
- Financial analysis including development and operating pro forma
- Economic and social impact analysis

Priority considerations include:

- Ensuring the proposed sites are near or easily reachable by high-need residents while also attracting high spending customers.
- Benefiting regional farmers and food producers with convenient locations, accommodation of trucks, strong branding and marketing programs, and reasonable vendor fees.
- Engaging neighborhood residents to ensure community buy-in and generate enthusiasm and consumer loyalty.
- Creating active spaces that encourage social interaction and other precepts of placemaking, while welcoming tourists who value authentic local experiences.
- Creating ownership and management structures that provide strong oversight and management, leading to economically sustainable and impactful operations.

ROLE OF THE CITY

The City is the appropriate entity to initiate and lead the feasibility and concept planning process, working in partnership with funders and other stakeholders. A consultant team with experience planning, developing and operating farmers' markets and public markets should conduct the feasibility study, which includes a strong community engagement component.

KEY PARTNERS

Key partners for this initiative will include:

- Local food advocates
- Funders
- CATS
- Neighborhood/community groups near potential sites

POTENTIAL IMPACTS & BENEFITS

A successful new market or markets will have the following impacts:

- High volume sales for vendors
- Access to affordable local fresh food for low-income consumers of diverse cultural backgrounds
- Active, authentic placemaking
- Tourist destination

IMPLEMENTATION & TIMEFRAME

Near- to medium-term activities will include:

- Identification of potential sites
- Concept planning, community engagement, and feasibility studies on one or more sites

Longer-term activities will include:

- Facility design, development and construction
- Market business planning
- Launch and ongoing operation of market(s)

COST & FUNDING

Key costs for this initiative will include:

- Multisite feasibility study (~$120,000)
- Infrastructure design and construction costs
- Ongoing operating budget for market(s)

Funding is likely to come from a range of local and state sources, philanthropy, and debt.

NATIONAL MODELS FROM BENCHMARK COMMUNITIES

Grand Rapids Downtown Market

Development cost: $30 million
Annual operating budget: $2.1 million
Annual vendor sales: $14.6 million
Jobs created: Over 300

Grand Rapids Downtown Market is a recently constructed, award-winning mixed use public market facility that includes an outdoor farmers' market shed, indoor market hall, two restaurants, education and event spaces, and offices for nonprofit partners. The Market is located on a 3.5-acre site on the southern edge of downtown and contains 138,000 square feet over three stories. Planning and development of the Grand Rapids Downtown Market was a partnership between a nonprofit group of community leaders called Grand Action and the city's Redevelopment Authority. The project's funding reflected this public/private approach, with nearly matching public and private investments.

Learnings and relevance for Charlotte

The Grand Rapids Downtown Market is a state-of-the-art public market that emerged from a feasibility study and concept development plan by Market Ventures, Inc. Innovations include a rooftop greenhouse designed for growing, education, and events; a hands-on teaching kitchen with six adjustable height cooking stations; a shared commercial kitchen that provides free selling spaces to kitchen incubator program participants; and an event room with a demonstration kitchen that has become the top wedding destination in Grand Rapids. A $30 million project on a 3.5-acre site, the Market was designed based on available community resources and careful projections of demand and supply. Development financing included brownfield redevelopment funds, state economic development grants, and philanthropic investments.

The Grand Rapids Downtown Market has proven to be very successful since opening in September 2013. Vendor sales in 2017 reached $14.6 million and the Market has created over 300 jobs. Income from rents, parking and special events cover the Market's $2.1 million operating budget.

Rochester Public Market

Annual operating expense: $600,000

Rochester Public Market is an historic public market district owned and operated by the City of Rochester. The Market regularly attracts 40,000 customers each Saturday representing a broad cross-section of the community.

Learnings and relevance for Charlotte

Located within a low income area and accessible to other neighborhoods by bus and with free parking, the Market attracts a diverse customer base because it offers low prices and good value, from discounted mainstream produce sold by wholesale distributors to farm-fresh products sold directly by regional farmers. The attractive open sheds, ethnic food kiosks, and independent small shops create an active public space.

Revenues for the Rochester Public Market come mainly from vendor rents and equal approximately $800,000 annually. Direct operating expenses equal about $600,000 not including all city staff time devoted to the Market.

RECOMMENDATION 3: EXPLORE OPPORTUNITIES FOR NEW PUBLIC MARKETS AND LARGE-SCALE FARMERS' MARKETS

The Milwaukee Public Market saw 1.6 million visitors in 2017, its 12th year in business. Market vendors earn over $16 million in sales annually.

Milwaukee Public Market

Development cost: $10.8 million
Development funding: Private (~$6 million) and public (~$4 million)
Annual operating budget (2007): $850,000
Jobs created: 75 in first year
Annual vendor sales (2017): $16.5 million
Annual visitors (2017): 1.63 million

Milwaukee Public Market opened in 2005 and has become one of the most visited places in Milwaukee, with year-over-year increases in vendor sales and continual improvements to the neighborhood around the Market.

Learnings and relevance for Charlotte

The Milwaukee Public Market likewise conducted an extensive feasibility study and concept plan in 1999, which provided the foundation for fundraising and development. The Market opened in 2005 and has experienced year-to-year growth. The Market is run by a neighborhood non-profit organization, the Historic Third Ward Association, and has a staff of five people. The Market is now among the top three most visited locations in the city and part of a vibrant, mixed used neighborhood.

The Market opened with a total development cost of $10.8 million, of which about $6 million was funded through private sources, and about $4 million from public sources (federal and state). Its 2007 operating budget was $850,000. No public funding is contributed to the Market's annual operating budget. After just one year of operation, the Market was responsible for the creation of 75 new jobs in 18 new businesses.

The Milwaukee Public Market reported vendor sales of $16.5 million in 2017, along with a 6% increase of customer visits to 1.63 million. Gross sales per leasable square foot equal more than $1,300.

RECOMMENDATION 4

Maintain and increase the production of food in Charlotte's 'foodshed', especially by supporting career pathways and improved livelihoods for the region's farmers.

OBJECTIVE

To preserve farming in the Charlotte region as a viable career, way of life, and robust economic engine, and to sustain and increase the volumes of food produced in the region for its residents.

RATIONALE

To sustain and expand Charlotte's farmers' markets, farmers currently selling at the markets must maintain profitable operations, other regional farmers need to employ direct marketing, and/or new farmers interested in direct sales must be attracted to the region or the sector. The challenges facing small-scale farmers require targeted efforts that can address issues relating to labor, training, sharing of best practices, access to capital, transportation, communications, etc.

Minority-operated farms in particular represent the fastest growing operator demographics in the region, over a period when the total number of farms actually declined (2007-2012). Farming represents an important economic opportunity pathway for minority and immigrant farmers; thus, services and supports that are tailored to the specific needs and assets of these disenfranchised groups are especially needed.

Farmland preservation and access to land are another potential area of action in the Charlotte region. Mecklenburg County is already highly developed, and one recent estimate expects that the county will essentially run out of land by the year 2030[5]. It is in Charlotte's interest to preserve the productive land (and food supply) in its region by shoring up farmland within Mecklenburg County and working across county lines to support the preservation of farmland in surrounding counties. To this end, there has recently been renewed interest in the creation of a Voluntary Agricultural District in Mecklenburg County.

5 / https://www.charlotteagenda.com/98634/charlotte-will-run-real-estate-develop-2030/

RECOMMENDATION 4: MAINTAIN AND INCREASE THE PRODUCTION OF FOOD IN CHARLOTTE'S 'FOODSHED', ESPECIALLY BY SUPPORTING CAREER PATHWAYS AND IMPROVED LIVELIHOODS FOR THE REGION'S FARMERS.

ACTIVITIES & PRIORITIES

Recommended activities include:

- Convening a regional foodshed task force and summit: a cross-sector network for maintaining, supporting, and expanding food production and supply chains in the Charlotte region; a medium-term outcome of this network may be a regional foodshed plan
- Maintaining and expanding resources and services for the region's farmers and food entrepreneurs, across career stages
- Supporting expanded market opportunities for the region's farmers and food entrepreneurs, including (but not limited to) farmers' markets and coordinated wholesale connections
- Developing local food procurement policies for public and private institutions, such as schools, hospitals, city agencies, and prisons
- Convening producer-buyer meetups to allow the region's farmers to better access wholesale markets and scale up their production
- Development of a regional food branding initiative - possibly in coordination with CFMA joint marketing and branding
- Collaboration and goal-setting to preserve productive farmland in the region for current and future generations (e.g. a commitment to work with other regional governments to preserve 10% of the productive farmland in the Charlotte region over the next 10 years)
- Supporting educational programs and career entry pathways, for example:
  - » Convening workforce programs in Charlotte to identify and coordinate opportunities for potential farmers
  - » Creation of a farm apprenticeship program through Charlotte-Mecklenburg Schools
  - » Creation of a summer farm program through the Mayor's Youth Employment Program
  - » Facilitation of employment opportunities with area farms or farmers' markets

ROLE OF THE CITY

Although the city may not ultimately lead the execution of initiatives supporting this recommendation, it will play an important role in coordinating partnerships, and should have a strong voice on behalf of an important constituent group: the residents of Charlotte, all of whom eat food, and thus have an interest in a resilient and healthy food supply. In particular, the city should assist in convening regional foodshed stakeholders (with Centralina Council of Governments), and should play a lead role in convening workforce programs and developing local food procurement guidelines for city agencies and institutions.

KEY PARTNERS

Important partners for this recommendation are likely to include:

- Carolina Farm Stewardship Association (and Lomax Incubator Farm)
- Carolina Farm Trust
- Piedmont Culinary Guild
- Mecklenburg County Soil & Water Conservation District
- NC Agricultural Development & Farmland Preservation Trust
- Land Trust for Central NC
- County Cooperative Extension services, e.g. Catawba County Extension has an Immigrant Agricultural Program targeted to Hmong immigrants
- Health organizations such as Atrium Health and Novant Health
- Centralina Council of Governments (CCOG) and individual county governments, especially in farmland preservation efforts
- FFA, 4-H and other K-12 educational programs
- University and community college programs

POTENTIAL IMPACTS & BENEFITS

Positive outcomes of this recommendation will include:

- Expansion of the small farmer economy, creating additional supply of products and farmers to participate at area farmers' markets
- Creation of jobs and career pathways to support a vibrant regional food economy – including not just farmers, but supporting sectors such as distributors
- Increased preserved farmland in the region

IMPLEMENTATION & TIMEFRAME

Near-term implementation steps will include:

- Creating an inventory of relevant existing programs, services, and farmland preservation tools

- Convening key players and stakeholders
- Developing priorities and identifying key gaps in farmer career pathways and livelihoods
- Identifying opportunities for increased local procurement through public and private institutions

Longer-term steps might include:

- Establishment of ambitious but realistic goals for farmland preservation, farmer livelihood metrics, number of farmer-vendors at Charlotte farmers' markets, etc.
- Support for and implementation of VAD
- Offering city- or county-owned vacant lots to urban farm and community garden projects
- Developing policy tools and inter-jurisdictional partnerships to preserve farmland in the region
- Development of new farmer programs and services to fill current gaps
- Creation of fund to pursue farmland preservation

COST & FUNDING

Top-line expenses for these initiatives could include:

- Grants and other program support for farmer support programs
- Direct grants to farmers
- Funding for farmland preservation efforts

Funding sources might include local and county government support, philanthropists and foundations, and impact investors.

NATIONAL MODELS FROM BENCHMARK COMMUNITIES

Minnesota Metropolitan Agricultural Preserves Program

The Minnesota Metropolitan Agricultural Preserves Program was created in 1980 to encourage the preservation of agriculture as a land use in the seven-county metropolitan area of Minneapolis-St. Paul. Enrolled landowners receive a reduction in property taxes and other benefits and protections. As of 2012, the program had over 207,000 acres of farmland enrolled across its seven-county region.

Learnings and relevance for Charlotte

This program provides an example of metropolitan area farmland preservation, and indicates that Minnesota policymakers recognized the importance of preserving farmland around the city. The benefits and protections provided to landowners could provide a useful model for preservation in and around Mecklenburg County. A multi-county regional policy framework may be more effective than pursuing individual county policies.

Sustainable Food Center

The Sustainable Food Center in Austin, Texas, is a multi-faceted organization with the mission to "cultivate a healthy community by strengthening the local food system and improving access to nutritious, affordable food." Among its programs are a Farm Direct initiative that helps connect the region's farmers with wholesale and institutional buyers, and a suite of Grow Local educational offerings that teach area residents about gardening and farming.

Learnings and relevance for Charlotte

Although this organization is not focused exclusively on farmers, it demonstrates a broad and systemic approach to strengthening a local food system and expanding opportunities for farmers through education and market connections. The Sustainable Food Center is a non-profit organization with an annual operating budget (in 2017) of about $2.6 million.

Other relevant programs include:

The New Entry Sustainable Farming Project (Boston) is focused on training the next generation of farmers. Its programs include farm business planning, an incubator farm, trainings, and a land matching service.

Cultivating Community (Portland, ME) leads the New American Sustainable Agriculture Project, which provides land-based farmer training and education to former refugees and other immigrants.

The Scenic Hudson Foodshed Conservation Plan outlines a plan to secure productive farmland in the Hudson Valley to preserve a local food supply for residents of New York City and the Hudson Valley.

The Greater Cincinnati Regional Food Policy Council has a Good Food Production and Land Use working group which focuses on policies to preserve farmland and encourage regional- based food production.

The Chesapeake Foodshed Network is a regional food system initiative that operates through a collective impact model. The network was created to encourage and enable collaboration across sectors in the food system. The network held its first annual Chesapeake Region Food System Summit in 2016 with over 100 stakeholders attending from across the region.

IMPLEMENTATION PLAN AND THE ROLE OF THE CITY

The following pages provide a proposed three-year plan to visualize activities and targets for each recommendation, starting with Q1, 2018.

As with all food system initiatives, the participation and support of a broad array of stakeholders and funders will be required for this report's recommendations to be implemented successfully.

Because this study and report have been completed at the behest of the City of Charlotte, the implementation plan is somewhat focused on the role of the City. At right, we identify the key immediate or near-term activities and funding targets that the City could commit to ensure the successful implementation of these recommendations. But all recommendations, and especially recommendations 1, 2, and 4, will rely on robust involvement and leadership from other food system stakeholders in the Charlotte region.

The implementation plan on the following pages identifies key activities to be pursued by the City and other stakeholders from now to the end of 2020.

KEY NEAR-TERM ACTIVITIES FOR THE CITY OF CHARLOTTE

For the successful execution of all activities:

- Commit city staff time to the continuation of the Farmers' Market Task Force (FMTF), who has led this work to date; broaden and supplement participation with other city agency representation as deemed appropriate.

1. Create a Charlotte Farmers' Market Association.

- Commit FMTF staff time to support the initial convenings and launch of the Charlotte Farmers' Market Association.
- Commit $50K in seed funding and $30-50K annually for years 2 and 3 for the CFMA. This funding should leverage additional financial support from outside partners. Uses of these funds will include salary for an association director/coordinator, marketing initiatives; and funding and promotion of a SNAP promotion / Double Bucks campaign and program.

2. Pursue improvements to the Charlotte Regional Farmers Market.

- Initiate conversations with the North Carolina Department of Agriculture and Consumer Services (NCDA&CS) to discuss research and strategic planning.
- Affirm need for improved intersection at Billy Graham as planned in City Park development.
- Through CFMA, initiate planning for SNAP/Double Bucks program.

3. Explore opportunities for new public markets and large-scale farmers' markets.

- Identify approximately $125K in city funding for public market feasibility and concept development.

4. Maintain and increase the production of food in Charlotte's 'foodshed', especially by supporting career pathways and improved livelihoods for the region's farmers.

- Partner with Centralina Council of Governments, Piedmont Culinary Guild, and Rivendell Farms to initiate convening of key foodshed stakeholders for regional foodshed task force.
- Seek $10-25K in city funding to support the task force and first Regional Foodshed Summit; as with the city's support of the CFMA, this funding should leverage robust additional support from diverse partners and stakeholders across the region.
- Work with County to convene City and County workforce programs.
- Identify opportunities for increased procurement of locally grown foods by city agencies and public institutions.

	2018 Q1-2	Q3
RECOMMENDATION 1 Create a Charlotte Farmers' Market Association.	**Complete food system research** (KK&P team) **Develop and finalize recommendations and plan** (KK&P team) **Present recommendations and plan to community and city leadership** (KK&P team)	**Convene market managers** to align on goals and format for the organization (City Farmers' Market Task Force) **Identify candidate host organizations**; assess their interest and capacity (City Farmers' Market Task Force with market managers) **Select host organization** (Market managers with the assistance of City Farmers' Market Task Force)
RECOMMENDATION 2 Pursue improvements to the Charlotte Regional Farmers Market.		**Initiate conversations with NCDA&CS** about research and strategic planning (City Farmers' Market Task Force, NCDA&CS) **Identify university researchers** to assist with consumer research at CRFM (NCDA&CS with City Farmers' Market Task Force and university partners) **Initiate planning for centralized SNAP and Double Bucks**, including identification of lead partner (City Farmers' Market Task Force)
RECOMMENDATION 3 Explore opportunities for new public markets and large-scale farmers' markets.		**Identify funding** for a public market feasibility and concept development plan (City Farmers' Market Task Force)
RECOMMENDATION 4 Maintain and increase the production of food in Charlotte's 'foodshed'		**Partner with Centralina Council of Governments, Piedmont Culinary Guild, Rivendell Farms and other regional stakeholders** to lay foundation for regional foodshed task force (City Farmers' Market Task Force with CCOG and stakeholders) **Convene City and County programs** to identify (1) potential program alignment with farm-based employment opportunities and (2) opportunities for increased procurement of locally grown foods (City Farmers' Market Task Force) **Support development of VAD** through engagement with Mecklenburg County Soil & Water Conservation District (City Farmers' Market Task Force, MCSWCD)

	2018 Q4	2019 Q1-2
RECOMMENDATION 1 Create a Charlotte Farmers' Market Association.	**Launch CFMA** under auspices of host organization; form leadership group and begin meeting regularly (host organization and CFMA membership) **Recruit and hire CFMA director/coordinator** (host organization and CFMA membership) **Establish priorities and activities** for 2019 growing season, likely to include SNAP acceptance, Double Bucks, and joint marketing efforts (CFMA)	**Develop three-year plan and budget**; identify and pursue funding sources (CFMA) **Create joint marketing plan** in collaboration with marketing firm (to be hired), with target launch to coincide with beginning of 2019 growing season (CFMA) **Complete preparations for other 2019 activities**, including broader SNAP acceptance at city's markets (CFMA)
RECOMMENDATION 2 Pursue improvements to the Charlotte Regional Farmers Market.	**Launch centralized SNAP and Double Bucks** (NCDA&CS) **Identify improved access and visibility strategies**, including shuttle bus, signage and new entrance from Billy Graham Parkway (City Farmers' Market Task Force and NCDA&CS) **Conduct customer intercept surveys** at CRFM (University partner or consultant) **Create local food signage program** (NCDA&CS and CFMA) **Identify funding** for masterplan (NCDA&CS)	**Work with Charlotte Farmers' Market Association** on increased marketing and educational programming (CFMA) **Issue RFP for masterplan** (City Farmers' Market Task Force and NCDA&CS) **Select consultant and begin masterplan work** (City Farmers' Market Task Force, NCDA&CS and consultant)
RECOMMENDATION 3 Explore opportunities for new public markets and large-scale farmers' markets.	**Create and advertise public market feasibility study RFP** (City Farmers' Market Task Force)	**Retain feasibility study consultant** and launch the study (City Farmers' Market Task Force and consultant)
RECOMMENDATION 4 Maintain and increase the production of food in Charlotte's 'foodshed'	**Continue building relationships** with regional food system stakeholders (CCOG, City Farmers' Market Task Force) **Formalize regional foodshed task force/network** with leadership committee and regular meeting schedule (CCOG, City Farmers' Market Task Force) **Begin planning for regional foodshed summit**; central topics for such a summit include farmer training and livelihoods, farmland preservation, and market development (Regional Foodshed Task Force, consultant)	**Analyze new data** from USDA Ag Census 2017 (release date Feb. 2019) to compare against 2012 benchmark data from this study (Regional Foodshed Task Force; consultant) **Convene pilot producer-buyer meetups** to create new wholesale relationships in advance of 2019 growing season (Regional Foodshed Task Force with buyers and farmer orgs)

	2019 Q3-4	2020 Q1-2	Q3-4
RECOMMENDATION 1 Create a Charlotte Farmers' Market Association.	**Measure and evaluate** activities and impacts during 2019 'pilot' season (CFMA) **Identify improvements and refinements** to 2019 activities; expand scope to include additional activities as appropriate/desired for 2020 (CFMA)	**Develop plan** and prepare for 2020 growing season (CFMA) **Continue and expand joint marketing efforts** based on successes from 2019 (CFMA)	**Measure and evaluate** activities and impacts during 2020 season (CFMA) **Identify improvements and refinements** to 2020 activities; expand scope to include additional activities as appropriate/desired for 2021 (CFMA)
RECOMMENDATION 2 Pursue improvements to the Charlotte Regional Farmers Market.	**Complete masterplan** (Consultant)	**Identify funding** for capital improvements (City Farmers' Market Task Force and NCDA&CS) **Implement operational changes**, if identified by masterplan (NCDA&CS)	**Initiate capital improvements** (NCDA&CS)
RECOMMENDATION 3 Explore opportunities for new public markets and large-scale farmers' markets.	**Complete public market feasibility study** (consultant)	**Identify funding** for predevelopment (City Farmers' Market Task Force)	**Initiate predevelopment for new market facilities**, including retention of design team, secure site, identify financing (City Farmers' Market Task Force)
RECOMMENDATION 4 Maintain and increase the production of food in Charlotte's 'foodshed'	**Hold pilot regional foodshed summit** (Regional Foodshed Task Force with stakeholders) Key summit outcomes include: • **Identify critical gaps** in farmer career paths • **Identify metrics and set goals** for farmland preservation, farmer success, and regional food economy activity	**Pursue and support key actions** identified during summit (Regional Foodshed Task Force and stakeholders, including City of Charlotte) **Identify and commit funding** to resources and services for the region's farmers (Regional Foodshed Task Force and stakeholders, including City of Charlotte)	**Measure progress on key metrics** identified at summit (Regional Foodshed Task Force) **Begin planning for second summit** (assuming biannual summit schedule) (Regional Foodshed Task Force) **Continue ongoing meetings and activities** of task force (Regional Foodshed Task Force)

APPENDICES

Primary Research

Data methodology note

Complete benchmarking report

Example Strategic Plan: Farmers Markets of Minneapolis Collaborative

PRIMARY RESEARCH: Interviewees, Site Visits, Focus Groups, and Community Meeting

Over the course of this project, the team conducted interviews (in person or by phone) with the following stakeholders:

BUYERS

Clark Barlowe, Heirloom Restaurant
Julie Jackson, The Produce Box
Sandi Kronick, Eastern Carolina Organics
Meghan Lambert, Johnson and Wales
Jesse Leadbetter, Freshlist

FARMERS

Brent Barbee, Barbee Farms
Paul Brewington
Wilbert Gamble
Daniel Price, Freedom Farm
Mary Roberts, Windcrest Organics
Kim Shaw, Small City Farm
Pressly Williams, Renfrow Farms

FOOD ACCESS

Dr. Iris Cheng, Atrium Health
Lisa Duffy, Atrium Health
Robin Emmons, Sow Much Good
Nadine Ford, Little Sugar Creek Community Garden
Rickey Hall, Seeds For Change
Brisa Hernandez, Atrium Health
Alisha Pruett, The Bulb
Elliott Royal, Mecklenburg County Health Department
Anna Zuevskaya, Seeds For Change

MARKET MANAGERS

Chris Clouden, 7th Street Public Market
Elizabeth Ann Dover, Plaza Midwood Farmers Market
Elaine Jones, Atrium Health - University Farmers Market
Beverly McLaughlin, Mecklenburg County Market
Amie Newsome, Charlotte Regional Farmers Market
Reggie Singleton, Rosa Parks Farmers Market
Mike Walker, Cotswold Farmers Market
Theodore Williams, Charlotte Open Air Market
Abby Wyatt, Davidson Farmers Market

SECTOR EXPERTS

Kristin Davis, NCSU Extension
Nicole DelCogliano, Organic Growers School
Katherine Hebert, Centralina Council of Governments
Thomas Moore, Carolina Farm Stewardship Association
Dan Murrey, Piedmont Culinary Guild
Mary Newsom, UNC Charlotte Urban Institute
Aaron Newton, Lomax Incubator Farm (CFSA)
Zack Wyatt, Carolina Farm Trust

POTENTIAL SITES

Greg Pappanastos, Savona Mill
Todd DeLong, re: Eastland Mall
Tony Kuhn, Station House
Varian Shrum, Camp North End

MARKETS VISITED

The project team also completed in-person visits to the following markets:

Atherton Market
Charlotte Open Air Market
Charlotte Regional Farmers Market
Cotswold Farmers Market
Davidson Farmers Market
Kings Drive Farmers Market
Matthews Community Farmers' Market
Mecklenburg County Market
Plaza Midwood Farmers Market

FOCUS GROUPS

During the team's second visit to Charlotte, in January 2018, they conducted three focus groups with market managers and farmers. Attendees at those gatherings were as follows:

FARMER FOCUS GROUP ATTENDEES

Paul Brewington
Lezlee Colrane
Amy Foster, Gilcrest Farm
Brian Hinson, Lucky Clays Fresh
Gagan Hunter
Mary Beth Miller, Lomax Incubator Farm
Thomas Moore, Carolina Farm Stewardship Assocation
Dean and Jennifer Mullins, Laughing Owl
Mary Roberts, Windcrest Farm
Jay Ross, Bell's Best Berries Farm
Reggie Singleton
Jessica Smith, Strongbird

Ben Street, Fare Farm
Brad Todd, Lucky Clays Fresh

MARKET MANAGER FOCUS GROUP ATTENDEES

Chris Clouden, 7th Street Public Market
Samantha DeRosa, Atherton Market
Charles Dirico, Selwyn Farmers Market
Tom Duncan, Friendship Gardens
Leslie James, Sugar Creek Farmers Market (proposed)
Amie Newsome, Charlotte Regional Farmers Market
Wil Jones, Rosa Parks Farmers Market
Isaiah Scott, Charlotte resident
Reggie Singleton, Rosa Parks Farmers Market
Brian Smith, Sugar Creek Farmers Market (proposed)
Mike Walker, Cotswold Farmers Market
Theodore Williams, Charlotte Open Air Market
Abby Wyatt, Davidson Farmers Market
Paulette Wilkes, Matthews Community Farmers' Market

COMMUNITY MEETING

On January 9, the project team held an open community meeting at Warehouse 242, with over 100 attendees. At this meeting, the team presented preliminary findings, and gathered input and feedback through dot-voting, interactive activities, and informal conversations.

Data Methodology Note

As noted on p. 12, Mecklenburg County total agricultural sales figures were not released for 2007 and 2012, due to confidentiality protocols. For the purposes of this report, sales for those years were estimated using a methodology detailed here.

The estimated Mecklenburg County total agricultural sales figures used in this report for 2007 and 2012 are the midpoints of two distinct estimation methods.

First, for any NC counties that had missing sales data for 2007, but not 2002 or 2012, the midpoint between their 2002 and 2012 sales was used as their estimated 2007 sales.

Next, for both methods, a total statewide unknown sales gap was calculated by subtracting all known county sales from total statewide sales. The resulting figure was the total sales attributable to counties with suppressed sales data.

This remaining sales gap was then distributed among these counties, including Mecklenburg, according to two methods:

1. By acreage alone: Total sales were distributed among the suppressed counties according to the number of acres they had in production that year.

2. By acreage with a dollars-per-acre factor: Mecklenburg County was likely to have much higher dollars per acre than the other suppressed counties, due to its proximity to the urban market (this is confirmed by 1997 and 2002 actual sales data). Thus, seven counties were identified whose average sales per acre were closest to Mecklenburg's sales per acre in 1997 and 2002. This cohort's sales per acre were averaged for 2007 and 2012, and this sales per acre figure was used to weight the distribution of the sales gap for Mecklenburg County.

The midpoint between the estimates generated by Method 1 and Method 2 was used as an estimate of Mecklenburg County agricultural sales for 2007 and 2012.

Benchmarking the Charlotte Regional Food System

In order to better identify realistic goals and contextualize model initiatives from elsewhere in the U.S., we have selected ten benchmark communities against which to compare Charlotte's regional food economy. These communities were selected qualitatively, primarily following the identification of model programs or initiatives that seemed particularly relevant to Charlotte's food system. The selected communities represent city populations ranging from 89,000 to just under 1 million, and metropolitan statistical area (MSA) populations ranging from just over 450,000 to more than 3.5 million. All selected communities are in the eastern half of the United States, with Austin, Texas, being the furthest west. The selected communities, which are mapped on the following page, are:

- Asheville, North Carolina
- Austin, Texas
- Grand Rapids, Michigan
- Hartford, Connecticut
- Kansas City, Missouri
- Milwaukee, Wisconsin
- Minneapolis, Minnesota
- New Orleans, Louisiana
- Raleigh, North Carolina
- Rochester, New York

For each indicator or metric, each community is measured on the basis of its city, core county (county where the benchmark city is primarily located), and/or multi-county MSA, depending on availability of data. A range of data sources were used, including the 2016 American Community Survey 1-year estimates, the 2012 USDA Census of Agriculture, and other USDA data sources for farmers' market and SNAP data.

Selected Benchmark Cities

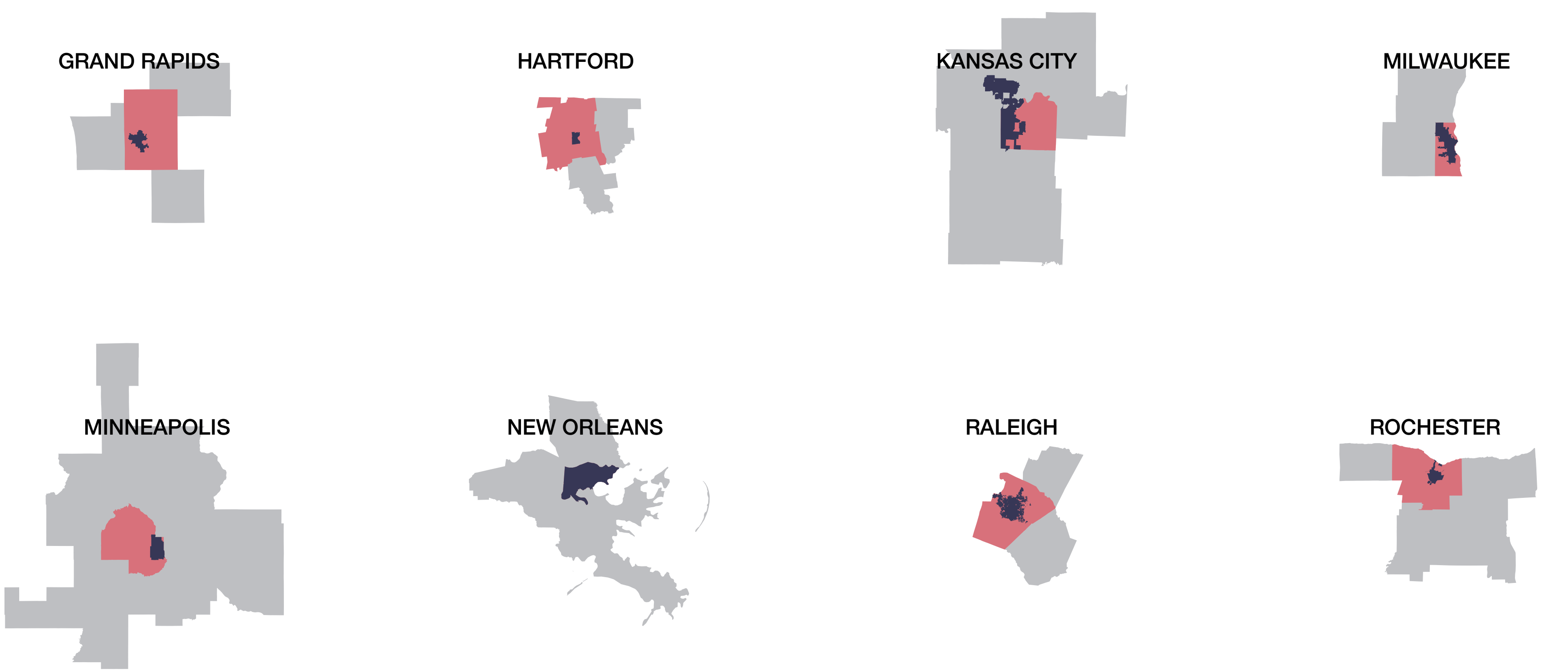
Benchmark City Land Area

City, county, and MSA boundaries are drawn to scale.

MSA

Core County

City



Land Area in Square Miles

Cities

Kansas City	314.9
Austin	297.9
Charlotte	**297.7**
New Orleans	169.4
Raleigh	142.9
Milwaukee	96.1
Minneapolis	54.0
Asheville	44.9
Grand Rapids	44.4
Rochester	35.8
Hartford	17.4

Core Counties

Travis County (Austin)	990.2
Kent County (Grand Rapids)	846.9
Wake County (Raleigh	835.2
Hartford County (Hartford)	735.1
Monroe County (Rochester)	657.2
Buncombe County (Asheville)	656.7
Jackson County (Kansas City)	603.9
Hennepin County (Minneapolis)	553.6
Mecklenburg County (Charlotte)	**523.8**
Milwaukee County (Milkwaukee)	241.4
Orleans Parish (New Orleans)	169.4

MSAs

Kansas City MSA	7,827
Minneapolis MSA	6,027
Charlotte MSA	**5,067**
Austin MSA	4,220
New Orleans MSA	3,202
Rochester MSA	2,928
Grand Rapids MSA	2,785
Raleigh MSA	2,118
Asheville MSA	2,033
Hartford MSA	1,515
Milwaukee MSA	1,455

Population

Cities

Austin	947,897
Charlotte	**842,029**
Milwaukee	595,070
Kansas City	481,360
Raleigh	458,862
Minneapolis	413,645
New Orleans	391,495
Rochester	208,886
Grand Rapids	196,458
Hartford	123,287
Asheville	89,098

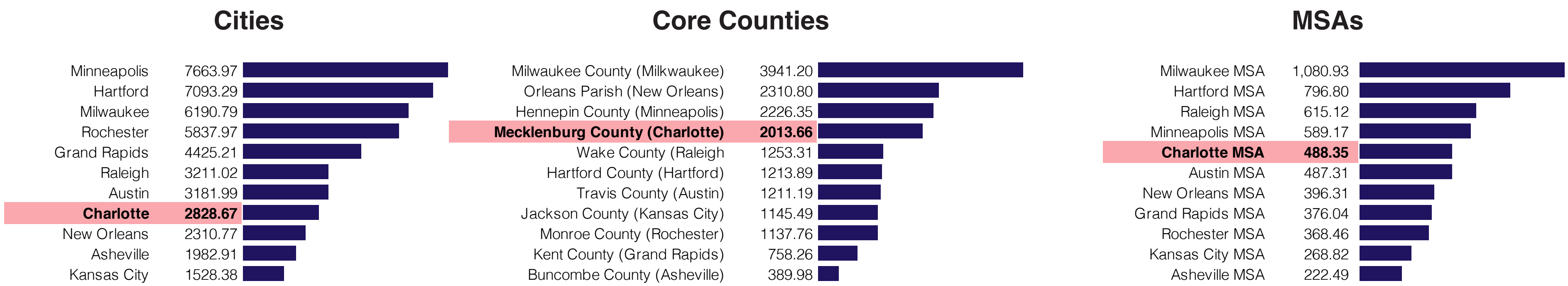
Core Counties

Hennepin County (Minneapolis)	1,232,483
Travis County (Austin)	1,199,323
Mecklenburg County (Charlotte)	**1,054,835**
Wake County (Raleigh	1,046,791
Milwaukee County (Milkwaukee)	951,448
Hartford County (Hartford)	892,389
Monroe County (Rochester)	747,727
Jackson County (Kansas City)	691,801
Kent County (Grand Rapids)	642,173
Orleans Parish (New Orleans)	391,495
Buncombe County (Asheville)	256,088

MSAs

Minneapolis MSA	3,551,036
Charlotte MSA	**2,474,314**
Kansas City MSA	2,104,115
Austin MSA	2,056,405
Milwaukee MSA	1,572,482
Raleigh MSA	1,302,946
New Orleans MSA	1,268,883
Hartford MSA	1,206,836
Rochester MSA	1,078,879
Grand Rapids MSA	1,047,099
Asheville MSA	452,319

Population Density (per square mile)

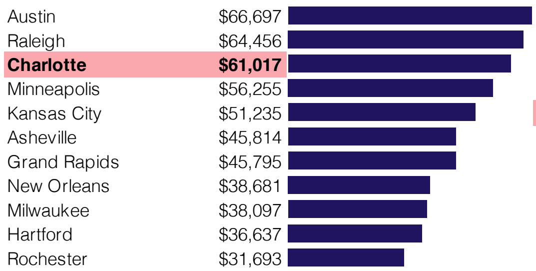


Charlotte is among the largest cities in this benchmark cohort, both in terms of population and land area; it ranks lower in population density. Mecklenburg County ranks third in population, ninth in land area, and fourth in population density. The Charlotte MSA ranks highly in population and land area and about middle in population density.

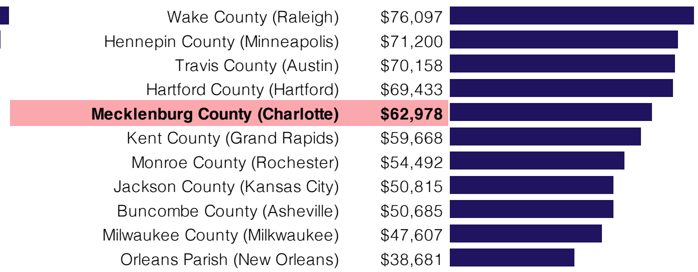
Source: American Community Survey, 2016 1-year estimates

Median Household Income

Cities



Core Counties



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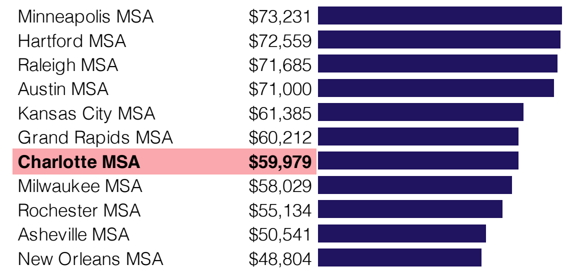
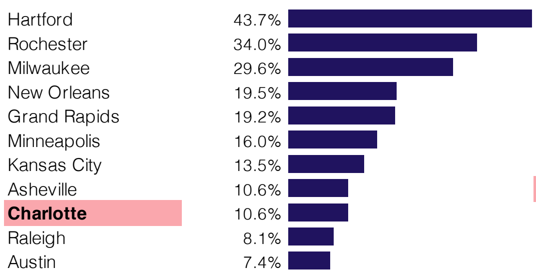
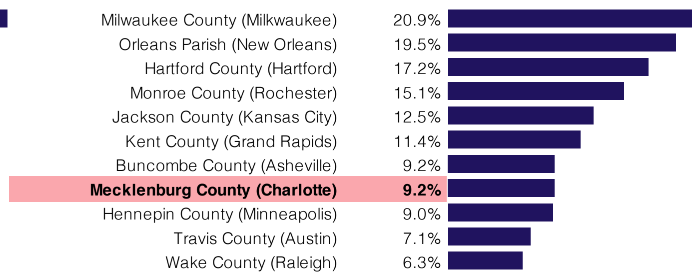


Percent of Households Receiving SNAP

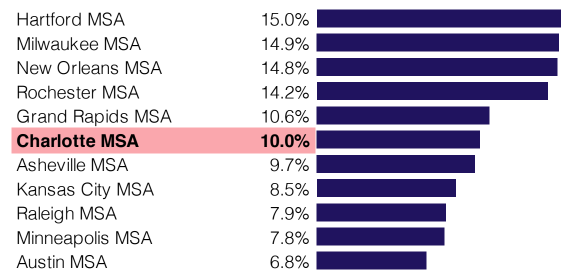
Cities



Core Counties



MSAs



Charlotte ranks third in median income and ninth in SNAP enrollment, indicating a relatively wealthier population compared to the cohort. Mecklenburg County and the Charlotte MSA rank roughly in the middle of the cohort for these metrics, indicating that the Charlotte area's wealth is somewhat more focused within its city boundaries compared to, for example, Minneapolis and Hartford, which both have MSA median incomes that are higher than their city median incomes (with a quite significant gap in the case of Hartford).

Percent of households receiving SNAP is not a direct indicator of poverty, however: it measures program enrollment, and a low participation rate could also indicate a poor outreach and enrollment mechanism.

Number of Farms

Core Counties

Kent County (Grand Rapids)	1,159
Travis County (Austin)	1,132
Buncombe County (Asheville)	1,060
Hartford County (Hartford)	899
Wake County (Raleigh	783
Jackson County (Kansas City)	701
Hennepin County (Minneapolis)	627
Monroe County (Rochester)	475
Mecklenburg County (Charlotte)	**237**
Milwaukee County (Milkwaukee)	82
Orleans Parish (New Orleans)	14

MSAs

Minneapolis MSA	13,251
Kansas City MSA	12,757
Austin MSA	8,819
Charlotte MSA	**7,328**
Grand Rapids MSA	4,680
Rochester MSA	4,268
Asheville MSA	2,844
Raleigh MSA	2,500
Hartford MSA	1,995
Milwaukee MSA	1,767
New Orleans MSA	1,027

Land in Farms

Core Counties

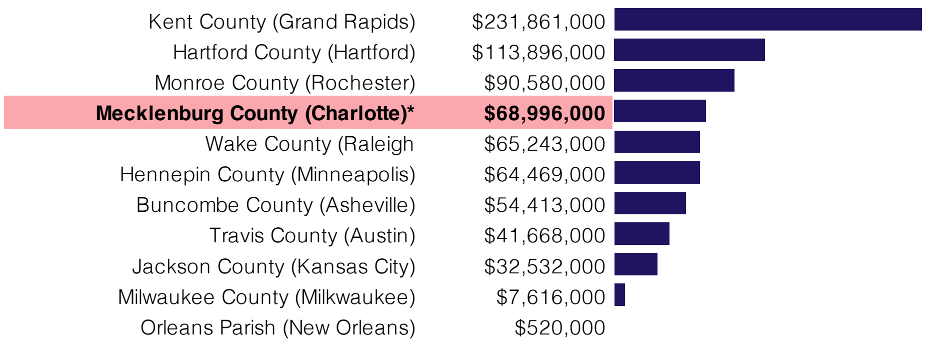
	% of land in farms	land in farms (acres)
Travis County (Austin)	39.9%	252,686
Kent County (Grand Rapids)	29.0%	157,493
Jackson County (Kansas City)	28.7%	110,891
Monroe County (Rochester)	23.5%	98,676
Wake County (Raleigh	15.8%	84,229
Buncombe County (Asheville)	17.0%	71,480
Hennepin County (Minneapolis)	19.4%	68,856
Hartford County (Hartford)	11.5%	54,062
Mecklenburg County (Charlotte)	**4.6%**	**15,439**
Milwaukee County (Milkwaukee)	3.0%	4,563
Orleans Parish (New Orleans)	0.1%	111

MSAs

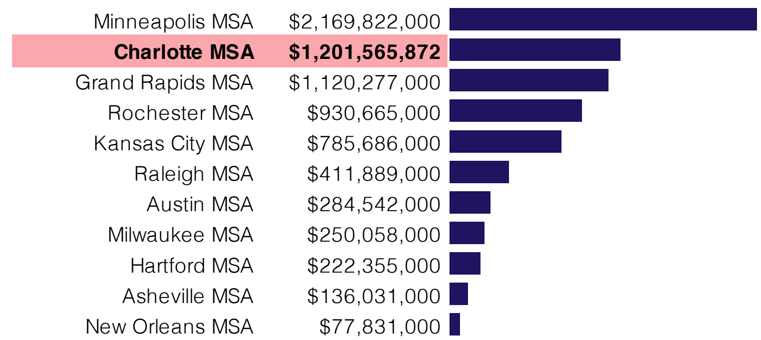
	% of land in farms	land in farms (acres)
Kansas City MSA	67.3%	3,124,397
Minneapolis MSA	53.2%	2,598,013
Austin MSA	65.0%	1,754,333
Charlotte MSA	**29.0%**	**938,872**
Rochester MSA	44.4%	927,382
Grand Rapids MSA	43.7%	746,084
Raleigh MSA	29.2%	395,945
Milwaukee MSA	31.7%	295,193
New Orleans MSA	11.2%	229,706
Asheville MSA	16.3%	212,489
Hartford MSA	13.0%	125,896

Total Agriculture Sales

Core Counties



MSAs



Mecklenburg County ranks quite low in terms of both number of farms and land in farms, with just 4.6% of its total land area being occupied by farms, compared to over 20% for the top four benchmark core counties. Its sales are estimated to rank fourth; however, this is an estimate - Mecklenburg County's 2012 agriculture sales were not released due to confidentiality protocols. This estimate is based on acreage and other factors (detailed in the appendix); the county's actual sales could be much higher or much lower.

The Charlotte MSA ranks in the middle in terms of both number of farms and farmland acreage, and it ranks second in terms of sales (this figure is also inclusive of a Mecklenburg County estimate).

* Denotes county or MSA figure that is based on incomplete data (i.e. some counties had data withheld for confidentiality).

Source: USDA Census of Agriculture 2012

Farms Participating in Direct-to-Consumer Sales

sorted by percent of all farms
bars show number of farms

Core Counties

Orleans Parish (New Orleans)	50.0%	7
Milwaukee County (Milkwaukee)	30.5%	25
Hartford County (Hartford)	28.3%	254
Monroe County (Rochester)	21.1%	100
Wake County (Raleigh	18.3%	143
Hennepin County (Minneapolis)	17.2%	108
Kent County (Grand Rapids)	16.3%	189
Mecklenburg County (Charlotte)	**16.0%**	**38**
Buncombe County (Asheville)	15.8%	168
Jackson County (Kansas City)	8.4%	59
Travis County (Austin)	5.4%	61

MSAs

Hartford MSA	25.1%	500
Rochester MSA	17.8%	760
Asheville MSA	15.8%	450
Grand Rapids MSA	12.9%	604
Milwaukee MSA	12.9%	228
Raleigh MSA	12.2%	306
New Orleans MSA	11.2%	115
Minneapolis MSA	11.1%	1,471
Charlotte MSA	**7.6%**	**558**
Austin MSA	5.6%	490
Kansas City MSA	5.4%	686

Farms Participating in Direct-to-Retailer Wholesale Sales

sorted by percent of all farms
bars show number of farms

Core Counties

Orleans Parish (New Orleans)	50.0%	7
Hartford County (Hartford)	10.1%	91
Mecklenburg County (Charlotte)	**9.7%**	**23**
Buncombe County (Asheville)	9.3%	99
Monroe County (Rochester)	8.2%	39
Wake County (Raleigh	6.9%	54
Kent County (Grand Rapids)	4.7%	55
Milwaukee County (Milkwaukee)	3.7%	3
Hennepin County (Minneapolis)	3.2%	20
Travis County (Austin)	2.6%	29
Jackson County (Kansas City)	1.4%	10

MSAs

Asheville MSA	9.3%	264
Hartford MSA	8.8%	175
Rochester MSA	7.8%	332
New Orleans MSA	6.1%	63
Raleigh MSA	4.9%	122
Grand Rapids MSA	3.5%	165
Milwaukee MSA	3.5%	61
Charlotte MSA	**2.7%**	**201**
Minneapolis MSA	2.2%	288
Austin MSA	1.7%	152
Kansas City MSA	1.0%	132

Direct-to-Consumer Sales

sorted by percent of total agriculture sales
bars show direct-to-consumer sales in dollars

Core Counties

Hartford County (Hartford)	6.59%	$7,509,000
Monroe County (Rochester)	3.26%	$2,955,000
Orleans Parish (New Orleans)	2.69%	$14,000
Buncombe County (Asheville)	2.10%	$1,141,000
Hennepin County (Minneapolis)	1.84%	$1,184,000
Milwaukee County (Milkwaukee)	1.39%	$106,000
Kent County (Grand Rapids)	1.30%	$3,015,000
Wake County (Raleigh	1.00%	$654,000
Travis County (Austin)	0.98%	$407,000
Jackson County (Kansas City)	0.53%	$173,000
Mecklenburg County (Charlotte)	**0.14%**	**$95,000**

MSAs

Hartford MSA	5.92%	$13,174,000
Asheville MSA	3.10%	$4,220,000
Milwaukee MSA	1.54%	$3,858,000
New Orleans MSA	1.44%	$1,123,000
Rochester MSA	1.16%	$10,762,000
Grand Rapids MSA	0.75%	$8,378,000
Minneapolis MSA	0.71%	$15,405,000
Austin MSA	0.66%	$1,889,000
Raleigh MSA	0.49%	$2,004,000
Kansas City MSA	0.47%	$3,698,000
Charlotte MSA	**0.32%**	**$3,884,000**

Direct-to-Consumer Sales per Capita

Core Counties

Hartford County (Hartford)	$8.41
Kent County (Grand Rapids)	$4.69
Buncombe County (Asheville)	$4.46
Monroe County (Rochester)	$3.95
Hennepin County (Minneapolis)	$0.96
Wake County (Raleigh	$0.62
Travis County (Austin)	$0.34
Jackson County (Kansas City)	$0.25
Milwaukee County (Milkwaukee)	$0.11
Mecklenburg County (Charlotte)	**$0.09**
Orleans Parish (New Orleans)	$0.04

MSAs

Hartford MSA	$10.92
Rochester MSA	$9.98
Asheville MSA	$9.33
Grand Rapids MSA	$8.00
Minneapolis MSA	$4.34
Milwaukee MSA	$2.45
Kansas City MSA	$1.76
Charlotte MSA	**$1.57**
Raleigh MSA	$1.54
Austin MSA	$0.92
New Orleans MSA	$0.89

Mecklenburg County and the Charlotte MSA rank in the lowest four counties/MSAs for several direct marketing indicators, with the exception of Mecklenburg County's direct-to-retailer wholesale farm participation (by percent of all farms) - an interesting exception, given that stakeholder interviews painted a picture of limited wholesale activity in the county.

Mecklenburg County and the Charlotte MSA especially stand out for having low direct sales as a percentage of total agriculture sales - both have the lowest percentage in the cohort.

Direct sales per capita connects direct-to-consumer farm sales figures with area population data, and is a way of normalizing direct sales in reference to the local population - it has been used as a way of measuring local food purchasing activity. Mecklenburg County and the Charlotte MSA rank tenth and eighth out of 11, respectively. These data points, especially in reference to Charlotte's relatively high median income, indicate that the city and region have significant room for growth in the local food economy.

Source: USDA Census of Agriculture 2012, American Community Survey, 2016 1-year estimates

Vegetable Sales

Core Counties

Monroe County (Rochester)	23,274,000
Hartford County (Hartford)	14,100,000
Kent County (Grand Rapids)	7,936,000
Buncombe County (Asheville)	6,361,000
Travis County (Austin)	6,267,000
Wake County (Raleigh)	3,581,000
Hennepin County (Minneapolis)	1,454,000
Milwaukee County (Milkwaukee)	1,061,000
Jackson County (Kansas City)	512,000
Mecklenburg County (Charlotte)	**292,000**
Orleans Parish (New Orleans)	*no data*

MSAs

Rochester MSA	100,470,000
Grand Rapids MSA	80,442,000
Minneapolis MSA*	71,698,000
Raleigh MSA*	44,481,000
Hartford MSA	19,040,000
Asheville MSA	18,745,000
Austin MSA*	7,474,000
Milwaukee MSA	6,419,000
Charlotte MSA*	**3,905,000**
Kansas City MSA*	2,469,000
New Orleans MSA*	829,000

Fruit & Tree Nut Sales

Core Counties

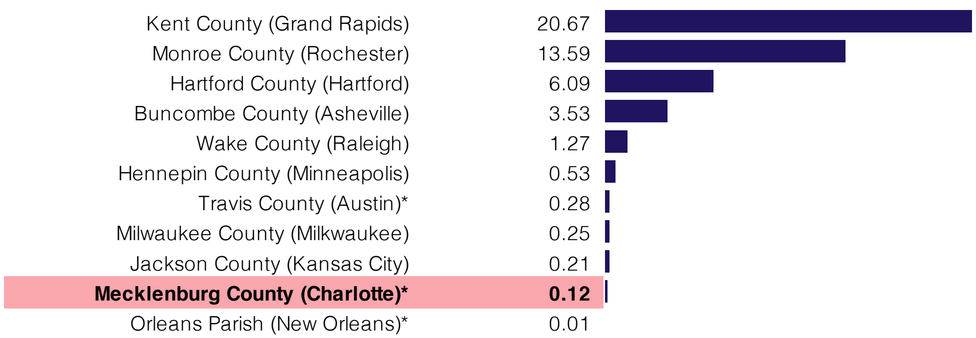
Kent County (Grand Rapids)	27,747,000
Hartford County (Hartford)	9,579,000
Monroe County (Rochester)	5,675,000
Travis County (Austin)	1,581,000
Wake County (Raleigh)	760,000
Buncombe County (Asheville)	647,000
Milwaukee County (Milkwaukee)	72,000
Mecklenburg County (Charlotte)	**70,000**
Hennepin County (Minneapolis)	*no data*
Jackson County (Kansas City)	*no data*
Orleans Parish (New Orleans)	*no data*

MSAs

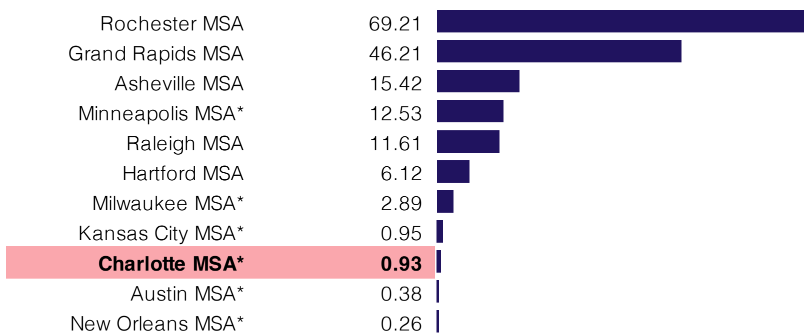
Rochester MSA*	132,473,000
Grand Rapids MSA	73,635,000
Hartford MSA	13,709,000
Asheville MSA*	12,387,000
Kansas City MSA*	7,288,000
Austin MSA	6,671,000
Minneapolis MSA*	5,159,000
Charlotte MSA*	**3,940,000**
Raleigh MSA*	983,000
New Orleans MSA*	405,000
Milwaukee MSA*	72,000

Vegetable & Fruit Acreage Per 1,000 Residents

Core Counties



MSAs



Mecklenburg County and the Charlotte MSA rank in the lowest four counties/MSAs for fruit and vegetable sales, as well as fruit and vegetable acreage per 1,000 residents. This indicates a fairly low level of production of crop types likely to be sold through direct and local markets. Although certainly not all fruits and vegetables are sold exclusively to residents in the county or MSA where they are grown, a low ratio of vegetable and fruit acreage to population indicates that current supply is probably insufficient to meet growing demand.

* Denotes county or MSA figure that is based on incomplete data (i.e. some counties had data withheld for confidentiality). With the exception of Mecklenburg County total agriculture sales, all counties with data withheld are treated as '0' value; thus, all figures for asterisked geographies represent a minimum, and the actual value is likely to be somewhat higher.

Source: USDA Census of Agriculture 2012, American Community Survey, 2016 1-year estimates

USDA-Registered Farmers' Markets Per 100,000 Residents

Cities

	# of markets	markets per 100K residents
Asheville	11	12.35
Rochester	16	7.66
Minneapolis	29	7.01
Hartford	8	6.49
Grand Rapids	10	5.09
Kansas City	15	3.12
Milwaukee	16	2.69
New Orleans	10	2.55
Raleigh	6	1.31
Charlotte	**8**	**0.95**
Austin	9	0.95

Core Counties

	# of markets	markets per 100K residents
Buncombe County (Asheville)	17	6.64
Hartford County (Hartford)	35	3.92
Monroe County (Rochester)	29	3.88
Hennepin County (Minneapolis)	43	3.49
Kent County (Grand Rapids)	20	3.11
Milwaukee County (Milkwaukee)	25	2.63
Jackson County (Kansas City)	18	2.60
Orleans Parish (New Orleans)	10	2.55
Mecklenburg County (Charlotte)	**15**	**1.42**
Wake County (Raleigh)	14	1.34
Travis County (Austin)	12	1.00

SNAP-Authorized Farmers' Markets Per 10,000 Households on SNAP

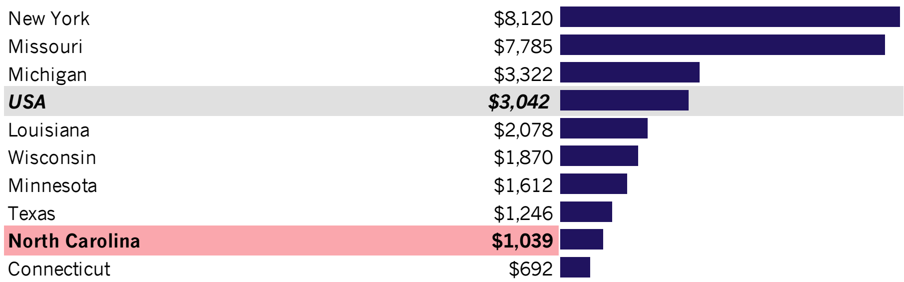
Cities

	# of markets	markets per 10K households on SNAP
Asheville	8	20.17
Minneapolis	19	6.90
Kansas City	12	4.48
Austin	12	4.37
New Orleans	9	2.99
Rochester	8	2.78
Raleigh	4	2.73
Hartford	5	2.43
Grand Rapids	3	2.12
Milwaukee	13	1.93
Charlotte	**6**	**1.78**

Core Counties

	# of markets	markets per 10K households on SNAP
Buncombe County (Asheville)	9	9.48
Hennepin County (Minneapolis)	25	5.51
Wake County (Raleigh)	10	4.09
Travis County (Austin)	13	4.03
Jackson County (Kansas City)	13	3.67
Kent County (Grand Rapids)	9	3.32
Orleans Parish (New Orleans)	9	2.99
Monroe County (Rochester)	9	1.99
Mecklenburg County (Charlotte)	**7**	**1.89**
Hartford County (Hartford)	11	1.82
Milwaukee County (Milkwaukee)	14	1.75

State and National SNAP Redemptions Per Authorized Farmer or Farmers' Market



Charlotte and Mecklenburg County are ranked low in USDA-registered farmers' markets per 100,000 residents and in SNAP-authorized farmers' markets per 10,000 SNAP-enrolled households. The USDA registry of farmers' markets should not be considered comprehensive or completely accurate or current, since, for example, there are several known Charlotte farmers' markets that are not registered with the USDA. Nevertheless, it provides the best dataset for making comparisons among US cities and regions. Charlotte's low numbers here may actually be an indication of relatively low participation in the registry.

The SNAP-authorized farmers' market list should be considered more accurate, however, since a market cannot accept SNAP if they are not authorized. Charlotte's and Mecklenburg County's low rates here, in terms of SNAP-authorized farmers' markets per 10,000 SNAP-enrolled households, are consistent with our qualitative assessment that the city's farmers' markets have very low SNAP participation.

SNAP redemption figures for farmers' markets and individual farmers are only released at the state level, and do not disaggregate between farmers and farmers' markets. North Carolina is ranked eighth out of nine states, and lower than the national average, in terms of SNAP redemption per farmer or market, indicating that, at least at the state level, North Carolina has room for growth in its SNAP redemption rates.

Source: USDA National Farmers Market Directory (2018), USDA SNAP-Authorized Farmers Markets (2018), USDA SNAP-Authorized Farmers and Farmers Markets Redemptions (FY 2017).

Market Profiles of Major Farmers' Markets or Public Markets

	Largest Farmers' Market or Public Market	Operator	Size	Built
Asheville	Western North Carolina Farmers Market	State of North Carolina	36 acres	1977
Austin	n/a			
Charlotte	Charlotte Regional Farmers Market	State of North Carolina	22 acres	1985
Grand Rapids	Grand Rapids Downtown Market	Owned by Grand Rapids Downtown Development Authority, operated by Grand Rapids Downtown Market, Inc.	Approx. 4 acres	2013
Hartford	Hartford Regional Market	State of Connecticut	32 acres	1950s
Kansas City	City Market	Owned by Kansas City, leased and operated by KC Commercial Realty Group	Approx. 4.5 acres	1857 (site), 1930s (building), additional building since
Milwaukee	Milwaukee Public Market	Business Improvement District No. 2	36,800 sq. feet (indoors)	2005
Minneapolis	Minneapolis Farmers Market	Owned by Minneapolis, operated by Central Minnesota Vegetable Growers Association	Approx. 3 acres	1937
New Orleans	n/a			
Raleigh	State Farmers Market	State of North Carolina	75 acres	1956, updated 1992
Rochester	Rochester Public Market	City of Rochester	Approx. 12 acres	1905

Strategic Plan
Farmers Markets of Minneapolis Collaborative

Background

Within the city proper, Minneapolis offers about 30 farmers markets of varying sizes – from mini-markets to some of the largest in the state. The number of farmers markets waxes and wanes from year to year. Recently, however, the overall trend has been one of significant proliferation. Most of these markets are seasonal. They are sponsored by a wide variety of organizations, from developers to private employers to membership associations to non-profit and neighborhood organizations.

What can we do to grow a more robust food economy that raises the tide of the entire community, while increasing food access for communities in need?

The presence and substantial growth in the number of farmers markets in Minneapolis reflect several key dynamics:

- Increasing consumer interest in fresh, healthy food raised on farms near the Twin Cities
- Community recognition of farmers markets as cultural assets
- Rapid expansion of farmers markets–without a corresponding increase in numbers of customers–mean nearby markets erode one another's viability, forcing farmers to attend more markets to achieve the same level of sales
- Larger investment in farmers markets as a public health intervention to increase consumption of fresh fruits and vegetables to reduce diet-related chronic disease
- Absence of coordinated planning or strategy among markets and the city to ensure appropriate number, size, and location of farmers markets to meet consumer and vendor needs
- Uncertainty of permanent sites for many markets, combined with human and fiscal resource constraints impacting market promotion, management, and vendor relations
- Opportunity for farmers markets to collaboratively identify challenges and develop an aligned strategy to address these issues together

Market managers and City staff recognized the significance of this rapid proliferation of farmers markets, an increasingly competitive food economy, and associated dynamics. For the last two years, market managers and City staff have met regularly, together identifying mutual challenges and opportunities. These discussions resulted in agreement among them that sustained collaboration is a valuable means to explore and develop solutions to these issues.

As this collaboration strengthened and trust grew among its members, these market managers articulated research needs to help strengthen the City's farmers markets and saw the potential

of formalizing their collaborative for longer-term, more strategic and intentional advocacy in the interests of all markets. These efforts have resulted in:

- A robust, ongoing partnership with the University of Minnesota, including faculty and graduate student engagement in the Collaborative, a comprehensive, multi-year research effort across all Minneapolis markets to gather metrics from market managers, vendors, and visitors, and a large federal grant to support this effort.
- Funding for a strategic planning process, involving dozens of stakeholders, to establish a long-range plan for the Collaborative, including mission, vision, values, strategic priorities, and related objectives, activities, and indicators of progress.

Farmers Market Collaborative Strategic Planning Process

In the late fall of 2016, the Farmers Markets of Minneapolis Collaborative launched a strategic planning process designed to (1) identify key strategic priorities and related actions that can ensure sustainable, prosperous farmers markets across the city and (b) build a productive, strategic alliance among farmers markets to advance shared interests.

This strategic planning process included three phases:

Taking Stock – Gathering perspectives from farmers market vendors, managers, customers, partner organizations, and funders, as well as reviewing background information, to understand the context, challenges, opportunities, and emerging priorities. The Taking Stock process informed the development of a *Taking Stock Brief*, used by participants in the planning process to guide discussion, direction, and decision-making. Components of the Taking Stock process included a survey taken by 85 market stakeholders (managers, vendors, customers, funders, city staff, public officials, etc.); focus groups (market managers, funders, and farmer/vendors), individual interviews; preliminary baseline data from some markets provided by the University of Minnesota; and written material describing the Collaborative.

Planning – Convening farmers market stakeholders and Farmers Market Collaborative partners to identify strategic priorities, related activities, and hoped for outcomes. Planning activities include stakeholder planning events (in-person, webinar, and online) and ongoing meetings of market managers active in the Collaborative. Results of the planning process informed the development of successive strategic plan drafts.

Drafting – Preparing a strategic plan draft included the incorporation of content from the *Taking Stock Brief*; feedback from stakeholder events, surveys, interviews, and focus groups. Up to three drafts of the plan will be prepared, with review and revisions provided by Collaborative stakeholders.

Defining "Success" for Minneapolis Farmers Markets

Through an extensive Taking Stock phase, stakeholders articulated a nuanced definition of what it means for Minneapolis farmers markets to be "successful." Analysis of stakeholder input identified 11 factors for farmers market success that can be prioritized in three tiers. According to this definition, Minneapolis farmers markets are successful when they:

Primary: Most Important Success Factor	
• Support farmer and vendor profitability	
Secondary: Key Success Factors	**Tertiary: Supporting Success Factors**
• Can sustain their operations • Support local and sustainable foods and products, purchased direct from producers • Improve access to healthy food • Foster community connectedness	• Offer a diverse mix of products • Offer opportunities for education, knowledge exchange, and learning new skills • Incubate small businesses • Contribute to more equitable health and economic outcomes • Have good, accessible, reliable locations • Collaborate to ensure mutual success

In addition, stakeholders identified the following necessary conditions for market success:

- **Support from city government** to ensure market locations offer adequate parking, infrastructure, and visibility
- **Steady patronage, volunteerism, donations, and sponsorships** by individuals and organizations across the community
- **Interesting, high quality markets** that reflect the flavor of the neighborhoods they serve
- **Consistent, clear inspections and enforcement** of food safety regulations, regardless of the inspector
- **Long-term, reliable investment** from local and state government for market infrastructure and inter-market collaboration

Successful farmers' markets are platforms of connection, exchange, and reciprocity – for farmers, other vendors, customers, eaters, chefs, retailers, customers, and communities. They support environmental stewardship, social equity, health, and economic vitality.

Vision, Mission, and Values Statements

Vision

Farmers markets are thriving cultural and economic assets that support health and prosperity for all our communities and vendors.

Mission

The Farmers Markets of Minneapolis Collaborative:

Fosters the vitality of the City's farmers markets through strategic and informed innovation, advocacy, education, and cohesive partnerships

Strategic planning stakeholders defined the primary purposes of farmers markets:

- **Provide access to good food** for customers
- **Serve as a profitable revenue source** for vendors
- **Strengthen communities** and serve as healthy public spaces

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Values

The Farmers Markets of Minneapolis Collaborative:

- Prizes fairness, inclusion, transparency, engagement, and collaboration to cultivate positive relationships among market managers, vendors, customers, and community partners
- Undertakes and communicates its work with intention, strategy, transparency, and accountability
- Works to ensure social, ecological, and economic sustainability of vendors, farmers and markets
- Promotes entrepreneurship of vendors and the health and well-being of customers

Strategic Priorities

Through the Taking Stock process, four strategic priorities emerged that will shape the Collaborative's focus and work in coming years:

1. Ensure Minneapolis has a profitable, sustainable, and equitable 'ecosystem' of farmers markets
2. Foster trusting, productive relationships and mutual initiatives to advance the success of Minneapolis farmers markets, market vendors, and farmers
3. Establish a strong, shared operational base for all City farmers markets
4. Maintain rigorous data collection and evaluation practices to inform funders and guide planning and policy advocacy

This strategic plan describes objectives and related activities associated with each of these four priorities.

Strategic Priority #1

Ensure Minneapolis has a profitable, sustainable, and equitable 'ecosystem' of farmers markets

Objective - Grow size of markets' customer base and increase customer purchasing

- Cost-share, create, and execute effective, compelling, joint promotional campaign, targeting new and existing customers, effectively using digital platforms and messengers (including an emphasis on increasing the cultural and economic diversity of the customer base, drawing customers from outside the City limits (including tourists), and describing market benefit; purchasing 'table' to attend high profile events together)
- Develop supportive collateral, such as a market directory and seasonal mailings
- Integrate farmers markets with high profile citywide and other highly visible events (i.e. Open Streets, State Fair, etc.)

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- Conduct market research on customers and non-customers, identifying key factors that shape shoppers' habits, factors that will bring non-customers to markets, and increase per customer purchasing, and shape
- Identify and provide creative solutions for supporting increased shopping or to better support existing heavy farmers market shoppers (i.e. carts, wagons, etc.)
- Develop and execute plan to expand offerings at farmers markets, including determining desirable number, types, and varieties of vendors, more prepared foods, more culturally-specific products reflecting markets' communities, and wine/beer/cider sales
- Offer more diverse education and entertainment options, including featuring more youth

Objective – Ensure an appropriate number of markets to meet vendor, citywide, and neighborhood needs

- Assess appropriate total number and distribution of markets to meet citywide and neighborhood needs
- Create operations plan to manage growth, development, and siting of markets in ways that promote the financial interests of vendors and meet communities' needs

Objective – Assess benefits and risks of established joint, standardized pricing policies

- Design and execute a feasibility assessment to determine the possibilities, parameters, and problems with establishing a Collaborative-wide standardized pricing policy (includes national scan, partnerships with existing networks of growers, and systematic evaluation of benefits and risks)
- Implement recommendations from feasibility assessment

Objective – Develop permanent sites for markets in well-distributed locations across the City

- Develop effective approach for ensuring reliability of seasonal farmers market locations
- Establish permanent, year-round markets in parts of the city
- Establish public-private partnerships to support permanent market sites

Objective - Establish adequate, long-term base of financial support for farmers markets

- Coordinate and collaborate on sponsorships across all markets to reduce competition and redundancies and increase mutual success
- Develop strategy for sustainability of accepting EBT at farmers markets. Obtain joint funding for financial and human resources support from city, county, state, federal and other sources, including an agreement from the City to assume management and absorb costs for market bucks program

Objective – Pursue policy and funding requests that benefit all markets

- Prepare and advocate for joint policy and funding requests to city and state government on behalf of all farmers markets in Minneapolis

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Strategic Priority #2

Establish trusting, productive relationships and joint initiatives between market managers, farmers, vendors, and stakeholders to advance the success of Minneapolis farmers markets, market vendors, and farmers

Objective – Develop and refine processes within and across markets to ensure effective communication and feedback between managers and vendors

- Conduct an audit of market processes regarding vendor recruitment, registration, and communication
- Develop a plan to align and streamline vendor-manager communication across markets, including effective feedback mechanisms from vendors to managers

Objective – Promote activities between market managers and vendors that build trusting, productive relationships.

- Encourage managers to visit vendor farms and operations, leveraging visits as part of market-specific and city-wide promotional campaign
- Systematically assess the kinds of information that vendors want from farmers markets, developing and executing transparent communications processes on a consistent basis
- Explore feasibility of online wholesale opportunities for market vendors

Objective – Shape perception of farmers markets as core cultural assets of the City

- Build an effective case (including framing and messaging) to funders, partners, and customers describes markets' contributions to the city's cultural capital for use in promotions, strategic communications, and fundraising
- Create and deploy strategic communications plan to target audiences to shape this perception
- Develop and sustain strong relationships with media and food influencers to support promotion and visibility of farmers markets and vendors

Objective – Build capacity of market managers, vendors, and volunteers

- Provide multi-faceted learning opportunities for key market stakeholders to enhance their effectiveness, such as peer to peer learning, topic-specific content for vendors (including merchandising, business planning, volunteer management, or useful technology) and market managers (including effective promotion and marketing, and use of technology, and mentorships)
- Conduct annual 'institute' for urban markets to build capacity on above topics and others identified by market managers
- Share evaluation findings in ways that help improve practices of vendors and markets
- Provide connections to funding and training to vendors through effective communications channels. Include this activity as a component of the strategic communications plan

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- Identify support services needed by vendors and explore how best to provide them
- Identify capacity-building and training opportunities for supporting stakeholders including market volunteers and farmers market boards

Objective – Meet the translation and communication needs of market managers and vendors who need to communicate across multiple languages

- Develop and implement plan to ensure effective translation of vendor and market meetings, market policies, and other written materials impacting vendors

Strategic Priority #3

Establish a strong, shared operational base for all City farmers markets

Objective – Create administrative and operational joint efficiencies to benefit all markets

- Explore feasibility and need for a shared organizational infrastructure for all markets in Minneapolis (e.g. St. Paul Farmers Market)
- Create and formalize a Minneapolis farmers market backbone organization/association
- Develop accompanying budget and recommended staffing plan to present for funding.
- Develop shared technology and accounting for 'market bucks,' EBT, and credit cards at all markets
- Provide regular communication, training, and technical assistance opportunities to market managers and vendors, as appropriate
- Conduct staffing needs audit to determine what positions can be shared cross-market. Assess which jobs, duties, and skills require professional expertise and which are suitable for market volunteers. Develop budget and recommended staffing plan to support all markets in the city
- Conduct operational needs audit of all markets, identifying systems and processes with potential for sharing costs and services (e.g. accounting, technology, evaluation, insurance, communication/public relations, data analysis, vendor support, etc.). Create and execute plan to share costs and services
- Develop integrated scheduling and siting process, so markets can act in the best interests of vendors and communities
- Explore options for most effective system for financial transactions at markets. Support operationalizing this system at interested markets

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Strategic Priority #4

Maintain rigorous data collection and evaluation practices to inform funders and guide planning and policy advocacy

Objective - Conduct research and evaluation that advances the vitality and sustainability of farmers markets in the City

- Continue to collect, analyze, and share economic metrics for market managers, vendors, and visitors on an annual basis
- Conduct and disseminate a citywide economic impact analysis, focused on the economic impact of farmers markets and vendors, including potential impact of increasing market sales
- Establish consistent, systematic means of obtaining vendor feedback and develop ongoing responses to address their challenges and ideas
- Survey customers, surrounding businesses, and community members regularly on topics relevant to meeting the Collaborative's strategic objectives
- Evaluate affordability and variation of vendor fees at markets across City
- Develop and execute an evaluation plan for the Collaborative that regularly gathers feedback from participants, reports progress on the strategic plan, assesses what does and doesn't work to contribute to market and vendor success, and disseminates this information through relevant channels in engaging ways

Next Steps

This strategic plan, developed through an extensive engagement process involving many customers, market managers, farmers, board members, and other partners, articulates challenges and opportunities (some perennial and some unique to the time and place) and offers concrete, smart solutions.

As the plan suggests–given the current public support and passion for farmers markets in Minneapolis–it is a timely opportunity to assert the critical cultural role of farmers markets to civic life, well-being, and economic vitality. Making this case can lay the groundwork for increased city, state, and federal support in the form of funding, public-private partnerships, reliable market locations, and more.

The Farmers Markets of Minneapolis Collaborative will develop an implementation plan to effectively address each of these strategic priorities, seeking funding where needed, advocating for policy where appropriate, and undertaking research and evaluation to help measure progress and advance the priorities outlined in this plan. This implementation plan will continue the ongoing commitment of the Collaborative to engagement, equity, inclusion, transparency, independence, and flexibility.

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